



GUAM VISITORS BUREAU

Japan Visitor Tracker Exit Profile

FY2014

DECEMBER 2013



Prepared by: QMark Research

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Background & Methodology

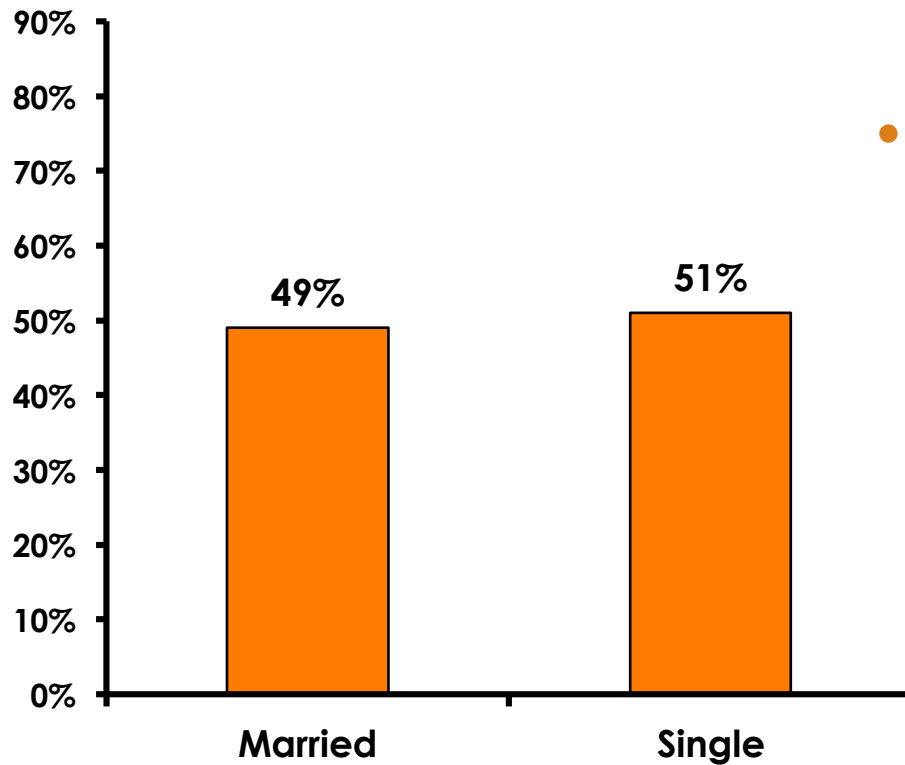
- All surveys were partially interviewer administered, as well as self-administered. Upon completion of the surveys, QMark's professional Japanese speaking interviewers double-checked each questionnaire for consistency and completeness, while the respondent is present.
- A total of **350** departing Japanese visitors were randomly interviewed at the Guam A.B. Wonpat International Airport's departure and waiting areas.
- The margin of error for a sample of **350** is +/- 5.23 percentage points with a 95% confidence level. That is, if all Japanese visitors who traveled to Guam in the same time period were asked these questions, we can be 95% certain that their responses would not differ by +/- 5.23 percentage points.

Objectives

- To monitor the effectiveness of the Japan seasonal campaigns in attracting Japanese visitors, refresh certain baseline data, to better understand the nature, and economic value or impact of each of the targeted segments in the Japan marketing plan.
- Identify significant determinants of visitor satisfaction, expenditures and the desire to return to Guam.

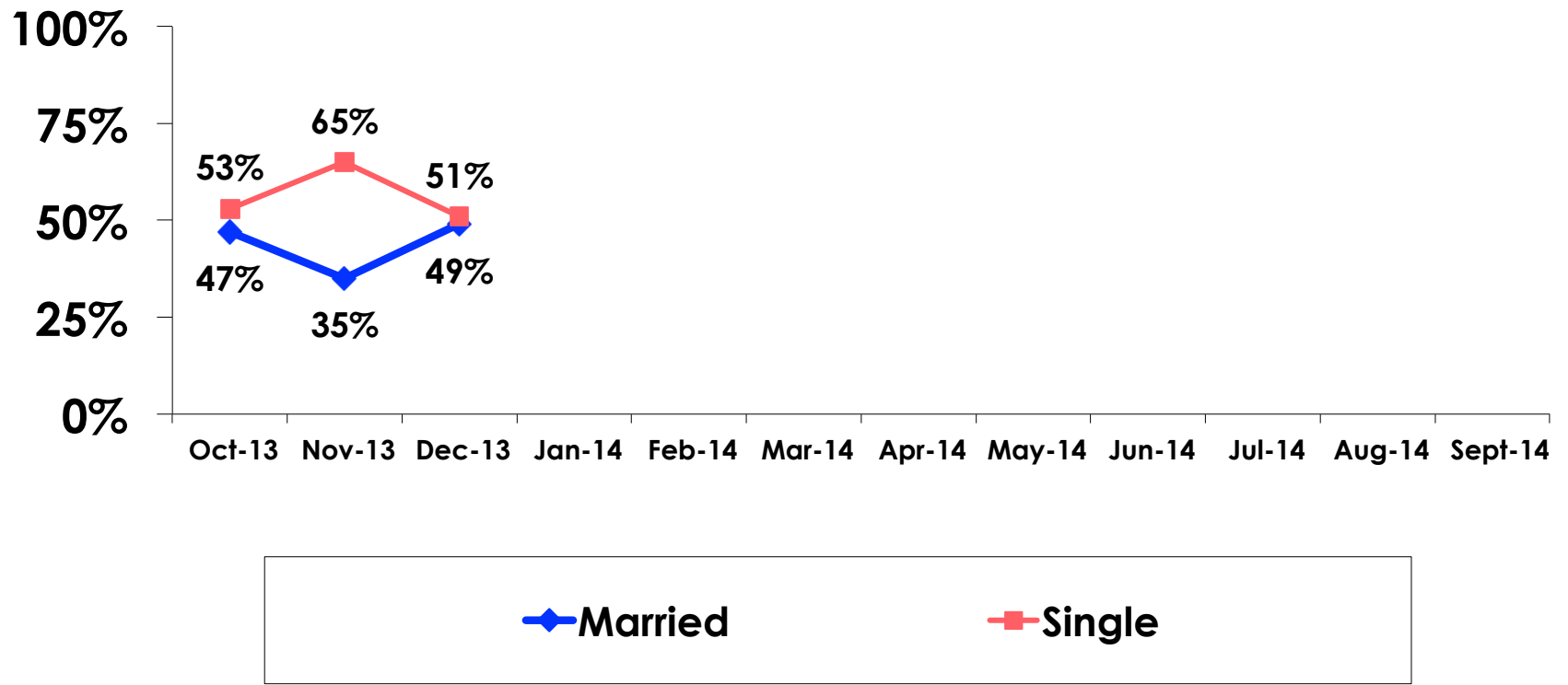
SECTION 1 **PROFILE OF RESPONDENTS**

Marital Status - Overall

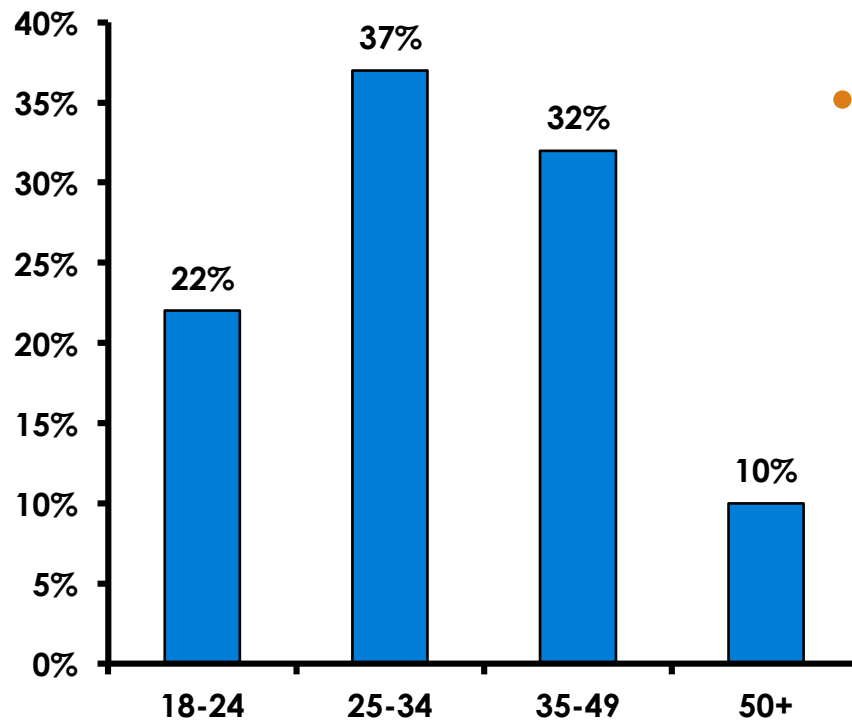


- Majority of first time visitors are single (64%).

Marital Status

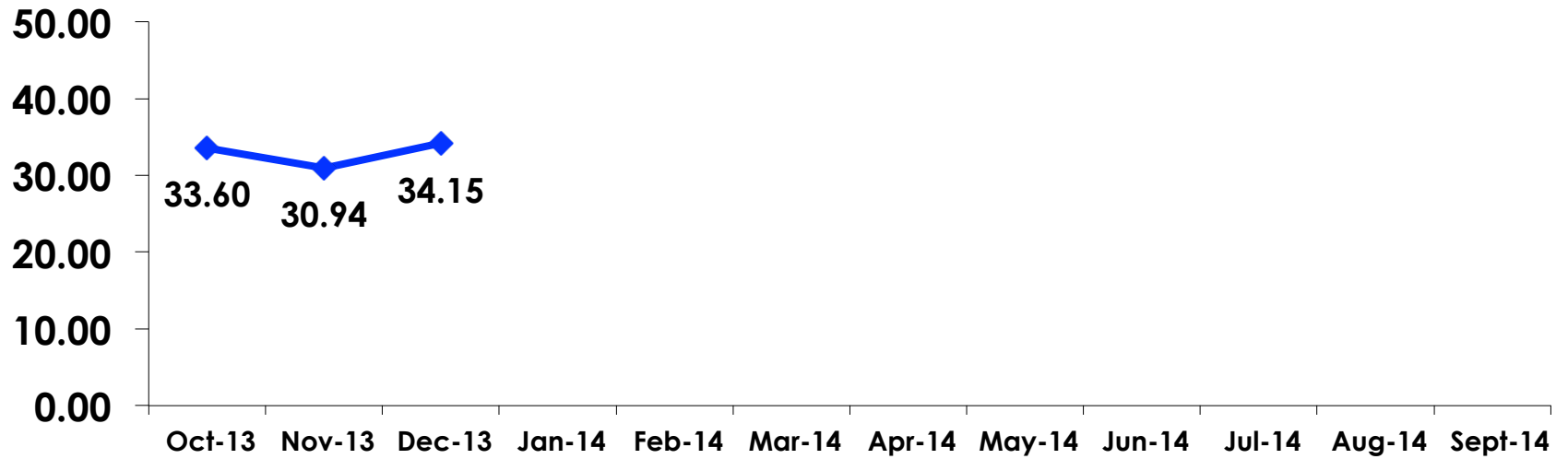


Age - Overall

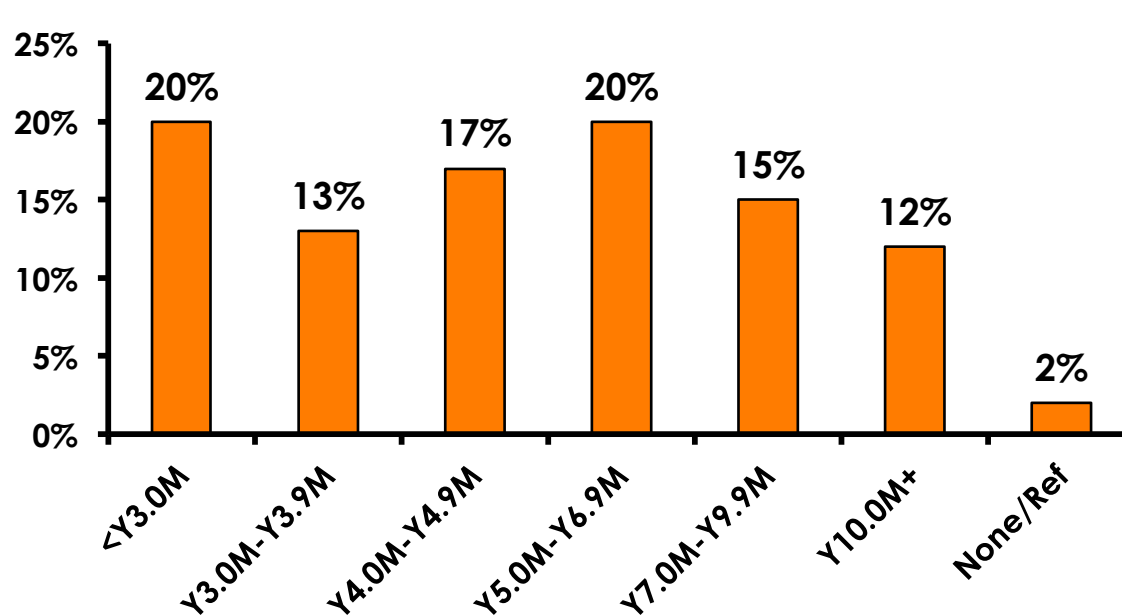


- The average age of the respondents is 34.15 years of age.

Average Age

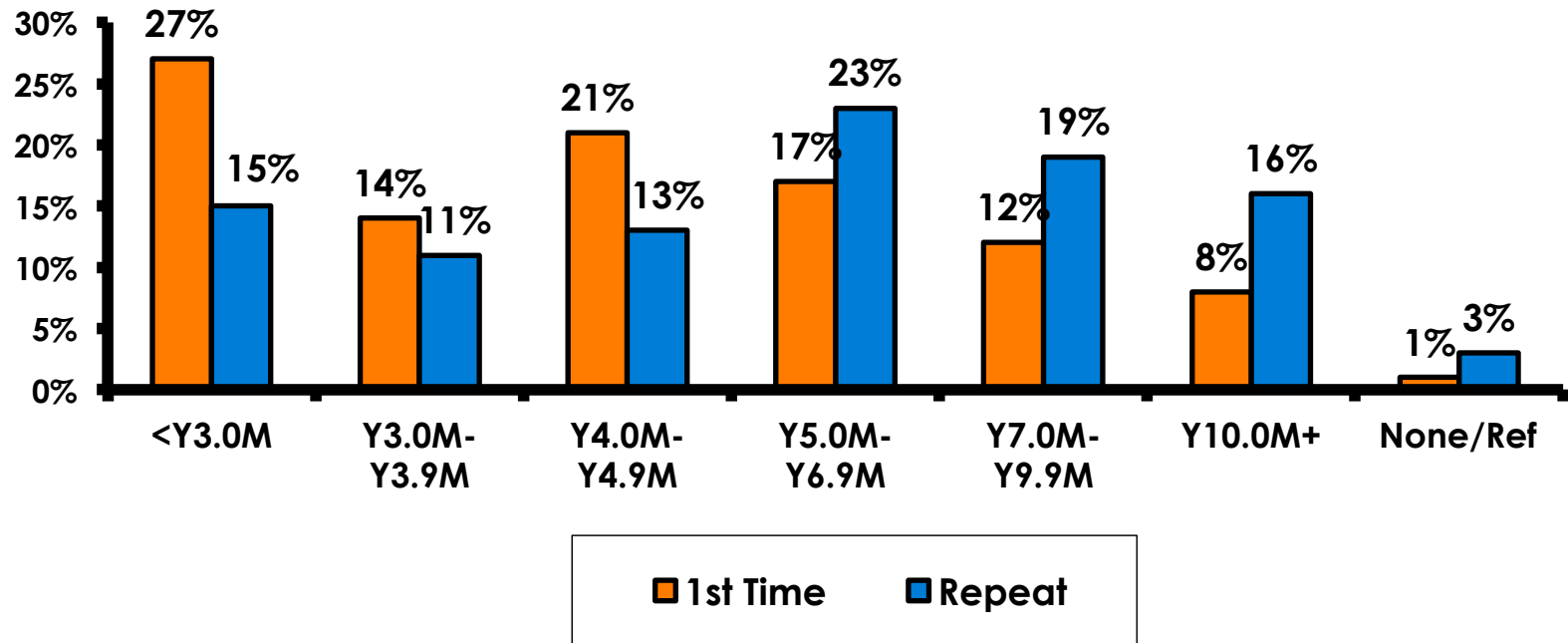


Personal Income



• ¥103.58=\$1

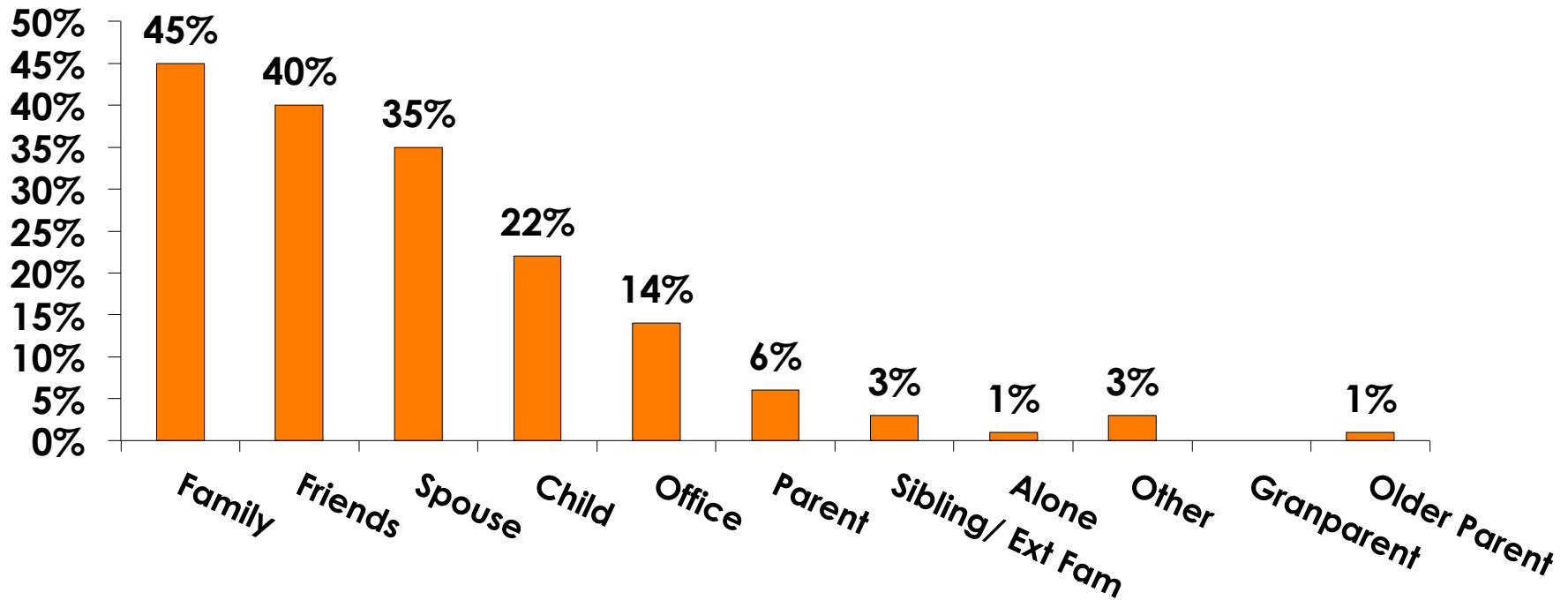
Personal Income – 1st time vs. repeat



Personal Income by Gender & Age

			TOTAL	GENDER		AGE			
			-	Male	Female	18-24	25-34	35-49	50+
Q26	<Y2.0 million	Count	19	5	14	10	7		2
		Column N %	6%	3%	10%	17%	6%		6%
	Y2.0M-Y3.0M	Count	44	19	25	14	19	4	7
		Column N %	14%	12%	18%	24%	17%	4%	21%
	Y3.0M-Y4.0M	Count	39	18	21	9	21	8	1
		Column N %	13%	11%	15%	16%	18%	8%	3%
	Y4.0M-Y5.0M	Count	51	25	26	4	25	18	4
		Column N %	17%	15%	18%	7%	22%	19%	12%
	Y5.0M-Y7.0M	Count	61	35	26	7	20	22	11
		Column N %	20%	21%	18%	12%	17%	23%	33%
	Y7.0M-Y10.0M	Count	47	35	12	4	12	25	5
		Column N %	15%	21%	8%	7%	10%	26%	15%
	Y10.0M+	Count	38	22	16	6	9	20	3
		Column N %	12%	13%	11%	10%	8%	21%	9%
	No Income	Count	6	4	2	4	2		
		Column N %	2%	2%	1%	7%	2%		
	Total	Count	305	163	142	58	115	97	33

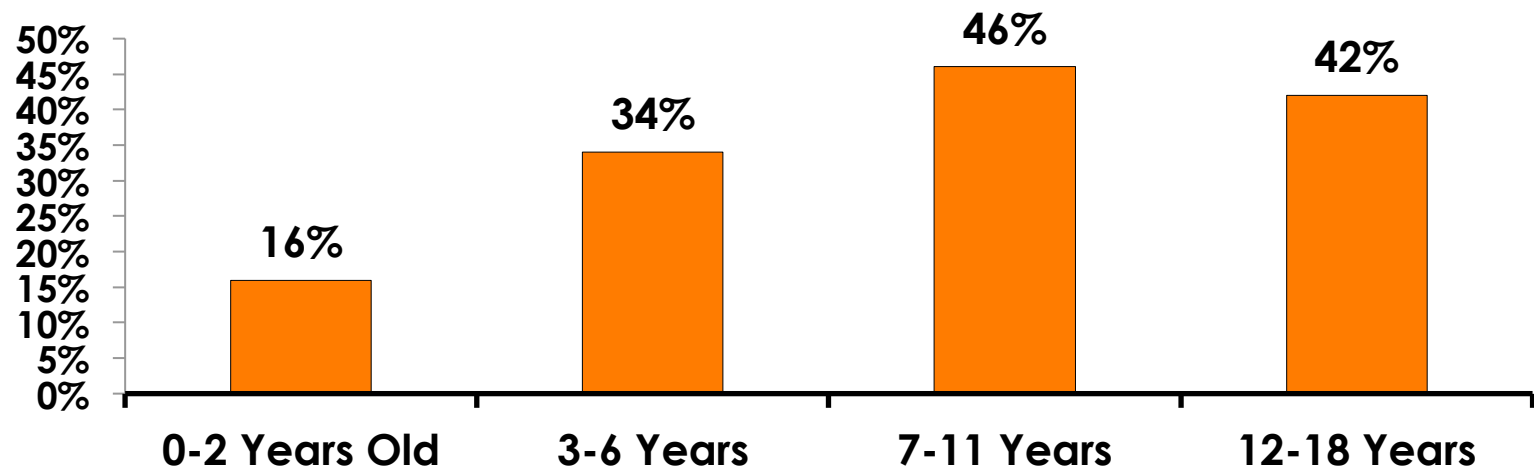
Travel Companions



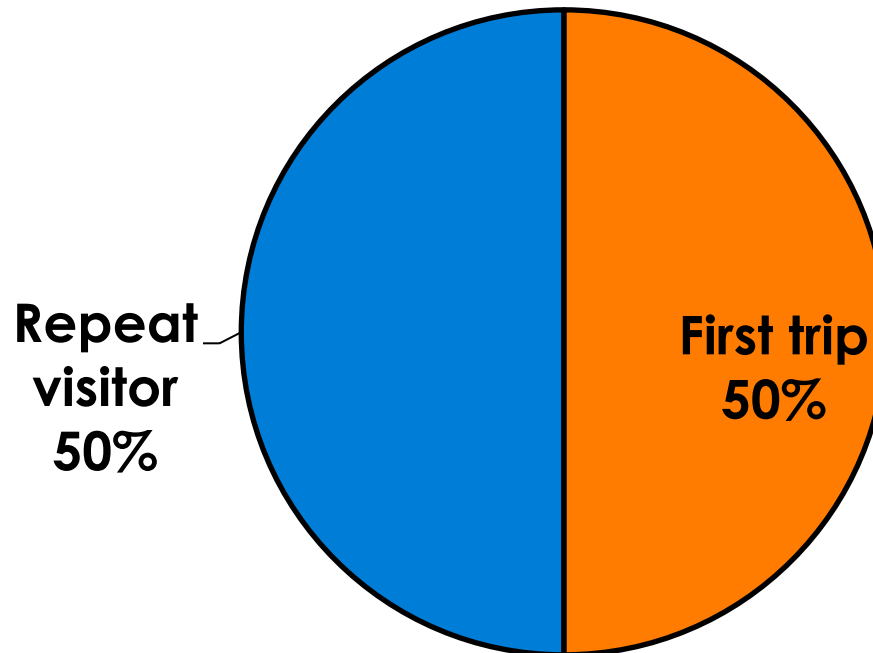
Number of Children Travel Party

N=77 total respondents traveling with children.

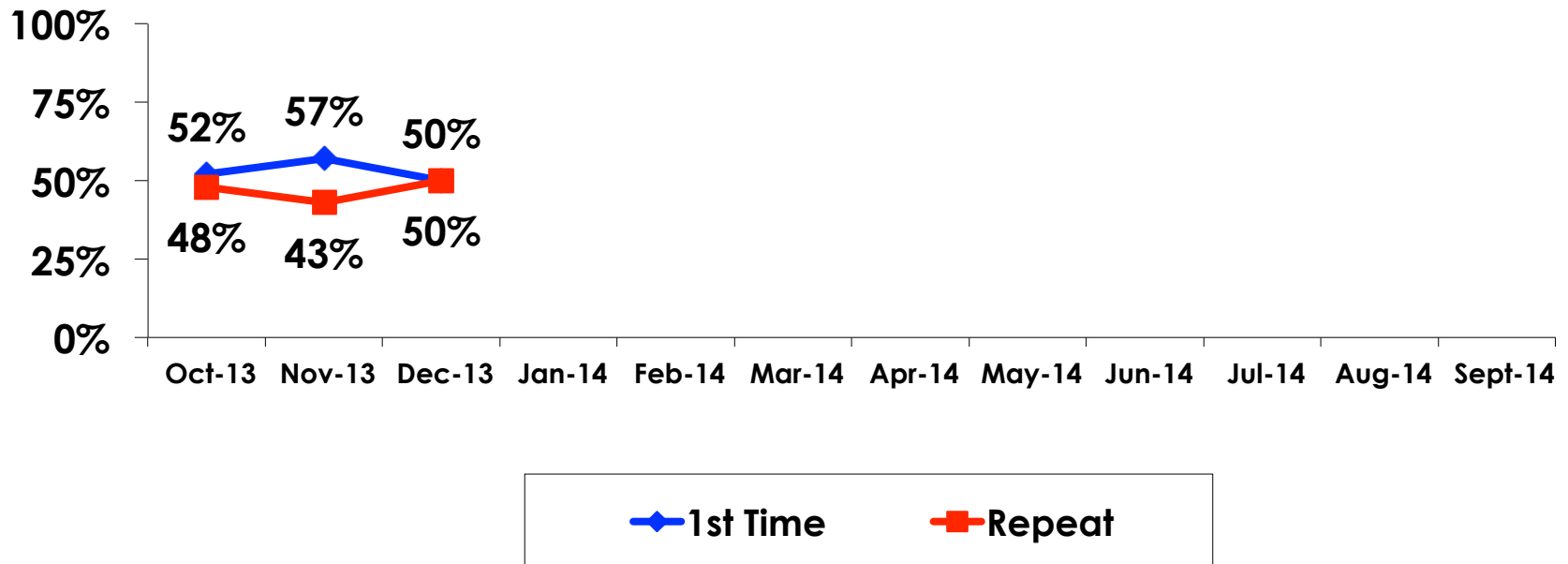
(Of those N=77 respondents, there is a total of 128 children 18 years or younger)



Prior Trips to Guam



Prior Trips to Guam



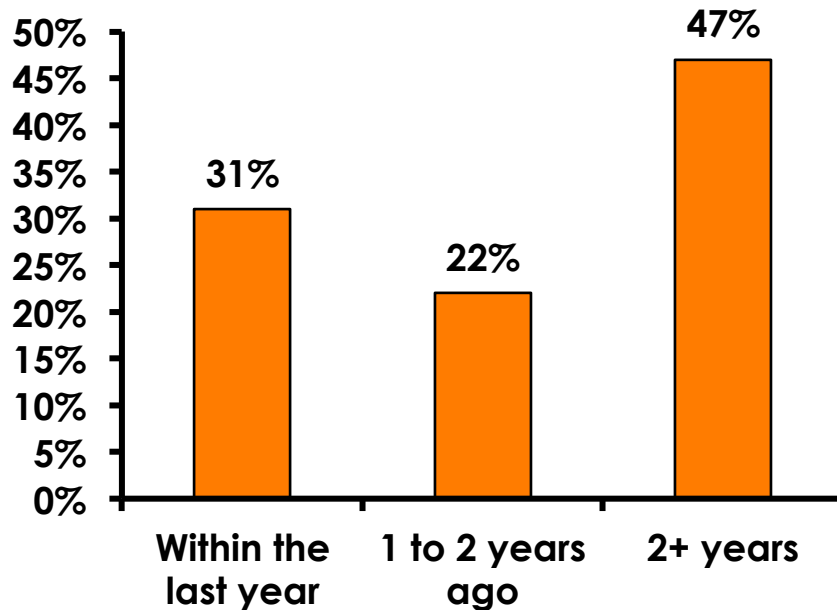
Trips to Guam by Age & Gender

			TOTAL	TRIPS TO GUAM	
			-	1st	Repeat
GENDER	Male	Count	176	83	92
		Column N %	50%	47%	53%
	Female	Count	174	93	81
		Column N %	50%	53%	47%
	Total	Count	350	176	173
AGE	18-24	Count	76	54	22
		Column N %	22%	31%	13%
	25-34	Count	126	76	50
		Column N %	37%	44%	29%
	35-49	Count	109	33	75
		Column N %	32%	19%	44%
	50+	Count	34	9	25
		Column N %	10%	5%	15%
	Total	Count	345	172	172

- First-time visitors are younger than repeat visitors to Guam.

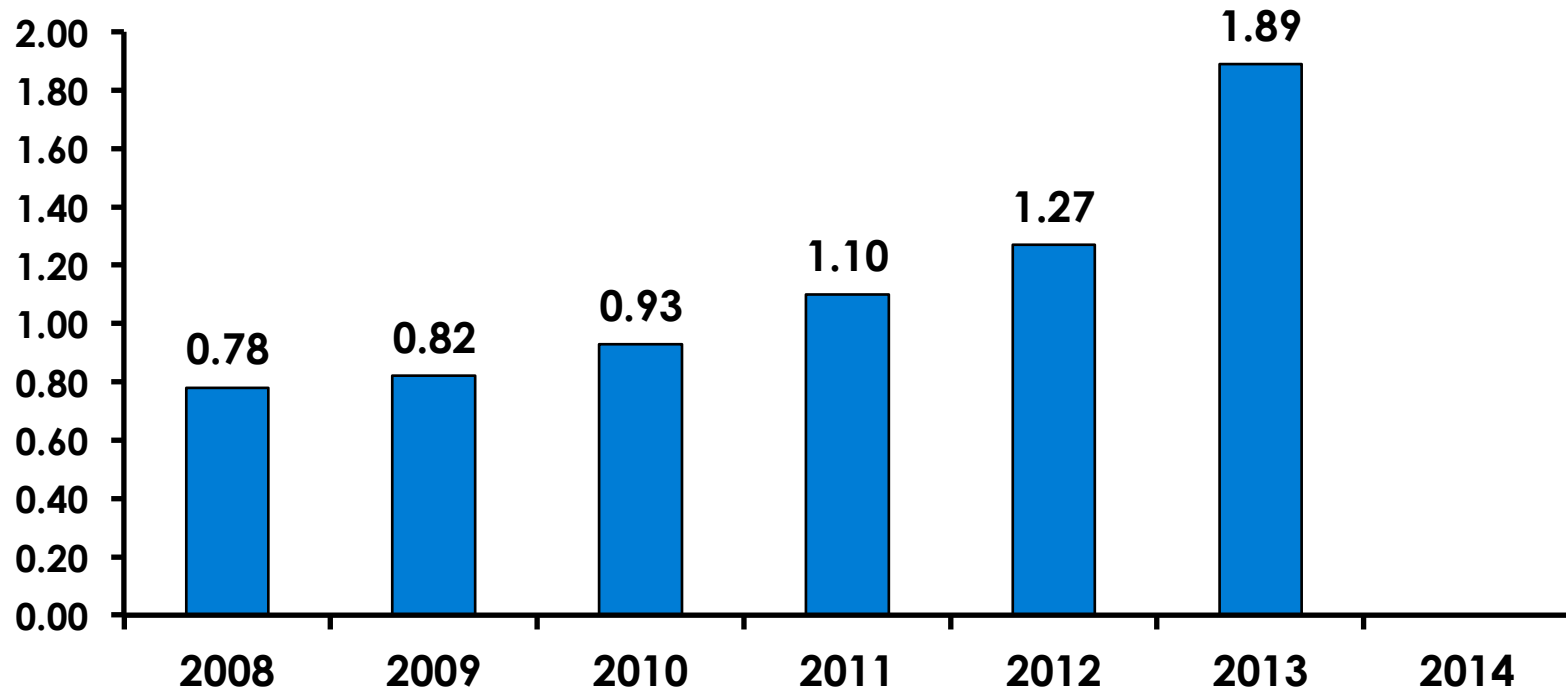
Repeat Visitors Last Trip

n = 170



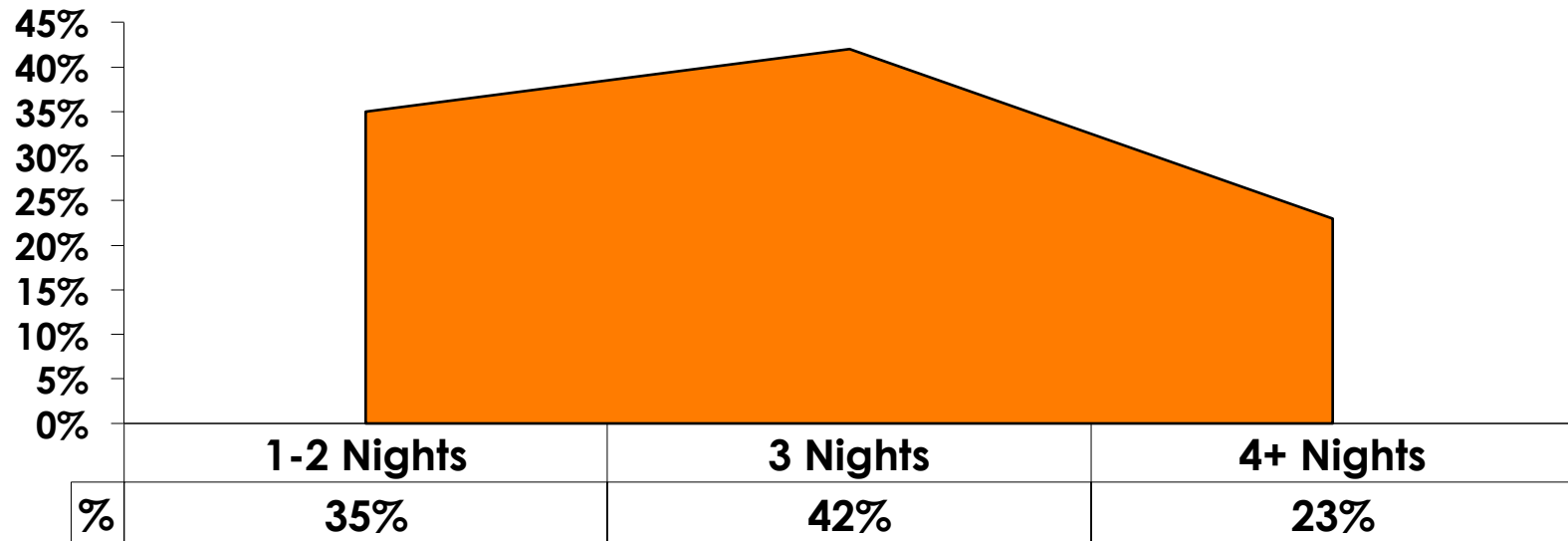
- The average repeat visitor has been to Guam 3.51 times.
- Half of the repeat visitors have been to Guam within the last 2 years.

Average Number Overnight Trips (2008-2014) (2 nights or more)

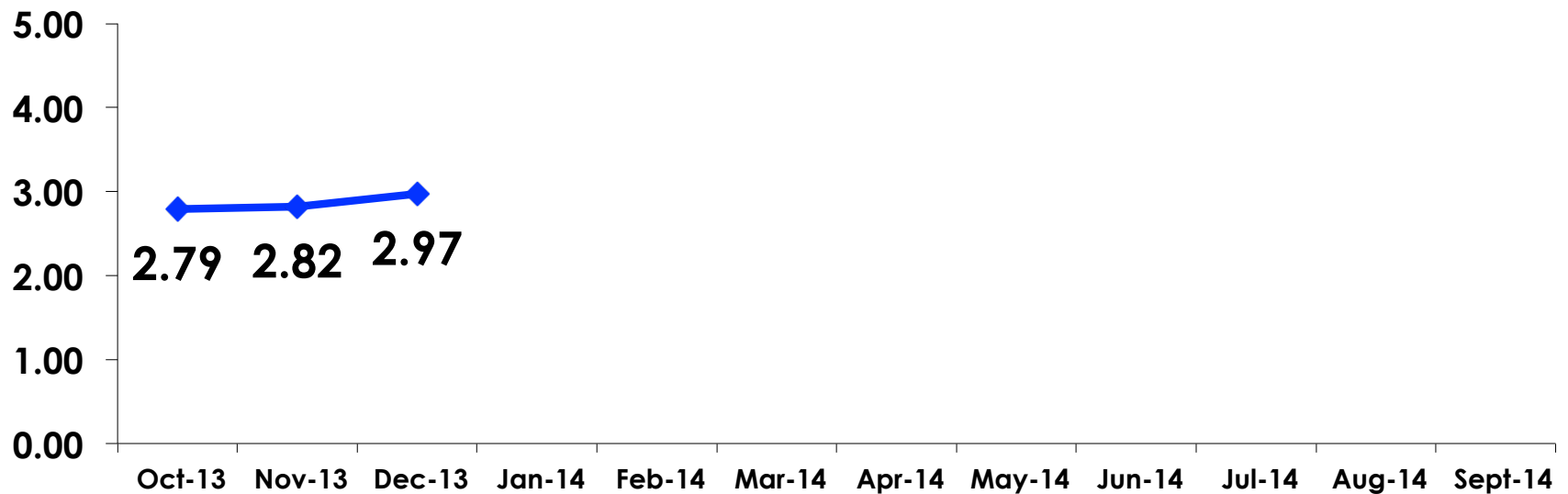


Length of Stay

Mean = 2.97 Days
Median = 3.0 Days



Average Length of Stay

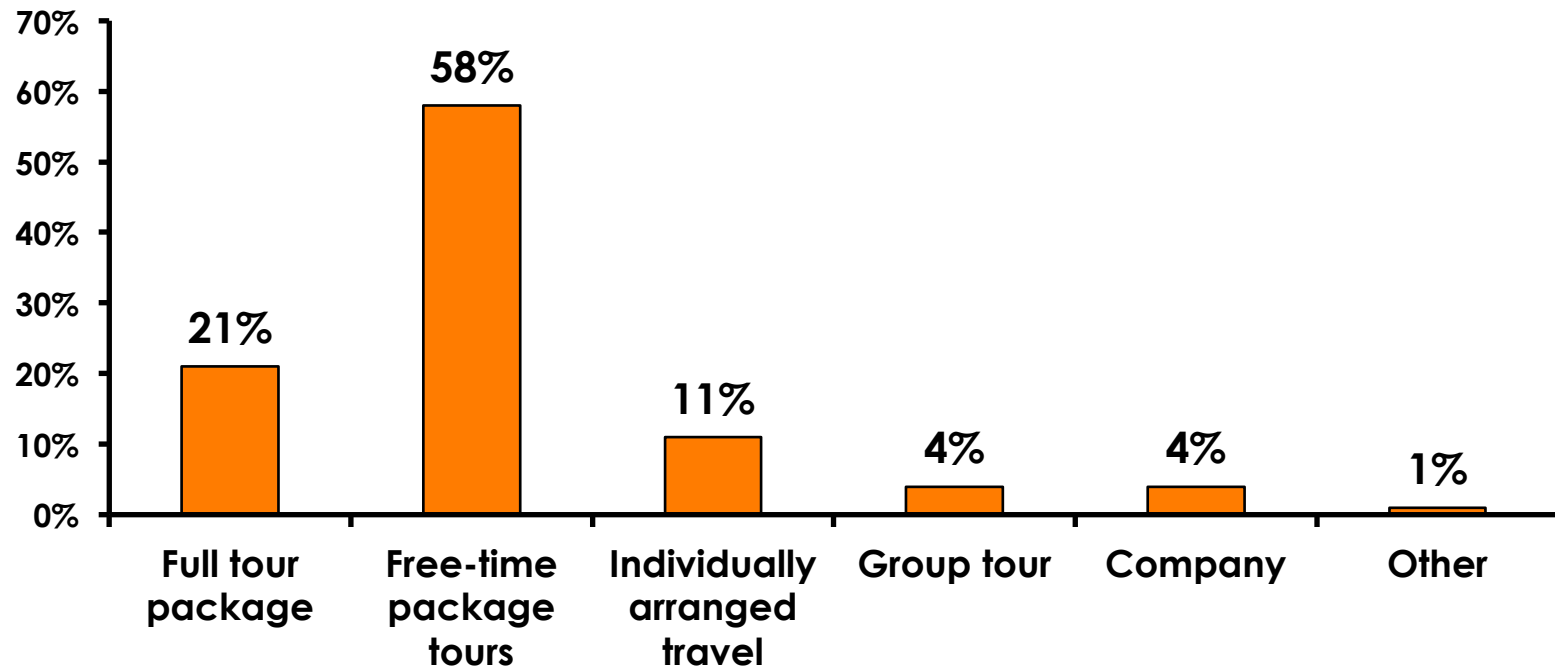


Occupation by Income

		TOTAL	Q26								
		-	<Y2.0 million	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income	
Q25	Office worker non-mgr	19%	11%	23%	36%	20%	21%	13%	18%		
	Engineer	16%	11%	19%	18%	16%	21%	21%	8%		
	Student	13%	21%	9%	8%	6%	7%	6%	11%	67%	
	Salesperson	12%		14%	10%	18%	11%	19%	11%		
	Homemaker	7%		5%	5%	6%	7%	11%	11%	33%	
	Self-employed	5%		7%	3%	4%	8%	4%	11%		
	Govt- office worker non-mgr	4%		7%	3%	8%	2%	2%	5%		
	Other	4%	26%	2%		4%	2%	4%			
	Manager	4%				2%	3%	4%	13%		
	Freeter	3%	21%		3%	2%	5%	2%			
	Teacher	3%		2%	5%	4%		2%	5%		
	Professional/ Specialist	3%	5%	2%	5%	8%	2%	2%			
	Skilled worker	3%	5%	5%	5%		7%		3%		
	Retired	1%		5%			2%				
	Govt- Manager	1%					3%	2%			
	Executive (30+ employees)	1%						2%	5%		
	Unemployed	1%						4%			
	Free-lancer	1%				2%					
	Total	Count	334	19	43	39	50	61	47	38	6

SECTION 2 **TRAVEL PLANNING**

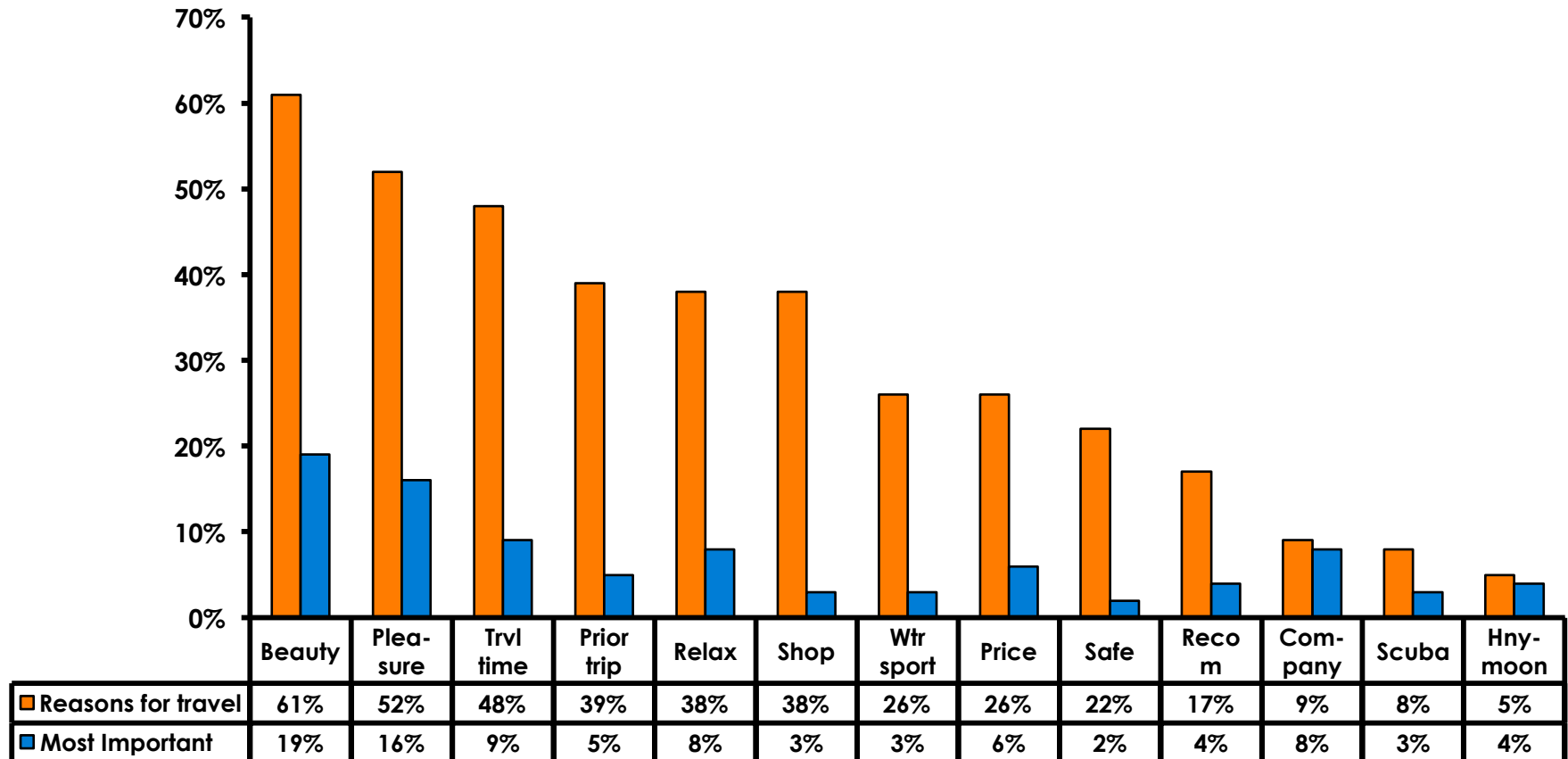
Travel Planning - Overall



Accommodation by Income

		TOTAL	Q26								
		-	<Y2.0 million	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income	
Q9	Guam Plaza Hotel	21%	21%	25%	23%	24%	18%	15%	16%	33%	
	Guam Reef & Olive Spa	13%	26%	20%	3%	12%	10%	17%	21%	17%	
	Pacific Bay Hotel	10%	32%	5%	10%	6%	8%	2%	8%		
	Outrigger Guam Resort	8%	5%	5%	8%	4%	15%	11%	11%		
	Onward Beach Resort	5%		2%	8%		7%	15%	5%		
	PIC Club	5%			10%	8%	7%	2%	8%		
	Hotel Nikko Guam	5%		9%	8%	6%	2%	4%	5%		
	Fiesta Resort Guam	4%		2%	3%	4%	7%	4%	5%	17%	
	Holiday Resort Guam	3%	5%		5%	8%	7%	2%			
	Hilton Guam Resort	3%	5%	2%		4%	3%	2%	8%		
	Grand Plaza Hotel	3%		11%		2%	2%	2%		17%	
	Leo Palace Resort	3%	5%	5%	5%	4%		6%	3%		
	Royal Orchid Guam	3%		5%	3%	2%	5%	2%			
	Guam Marriott Resort	3%			3%	4%		4%	3%		
	Sheraton Laguna Guam	2%		2%	3%		3%	4%			
	Westin Resort Guam	2%		2%	3%	4%	2%	2%	3%		
	Bayview Hotel	2%		2%	3%	2%	2%		5%		
	Oceanview Hotel	1%			3%	4%		2%		17%	
	Hyatt Regency Guam	1%				2%	3%	2%			
	Tumon Bay Capital Hotel	1%			3%						
	Other	1%					2%				
	Hotel Santa Fe	0%									
	Condo	0%									
	Guam Aurora Resort	0%		2%							
	Total	Count	349	19	44	39	50	61	47	38	6

Travel Motivation - Top Responses



Most Important Reason for Choosing Guam

- Guam's natural beauty/ beaches,
- Pleasure and
- Short travel time

are the primary reasons for visiting during this period.

Motivation by Age & Gender

		TOTAL	AGE				GENDER		
		-	18-24	25-34	35-49	50+	Male	Female	
Q5A	Natural beauty	61%	65%	58%	62%	56%	57%	65%	
	Pleasure	52%	56%	56%	46%	44%	48%	56%	
	Short travel time	48%	35%	53%	54%	41%	51%	45%	
	Previous trip	39%	23%	29%	55%	65%	43%	36%	
	Relax	38%	36%	35%	41%	38%	38%	38%	
	Shopping	38%	48%	40%	28%	38%	28%	47%	
	Water sports	26%	29%	36%	17%	12%	19%	33%	
	Price	26%	29%	25%	25%	21%	27%	24%	
	Safe	22%	13%	21%	24%	32%	26%	17%	
	Recomm- friend/family/trvl agnt	17%	31%	19%	6%	15%	14%	20%	
	Company/ Business Trip	9%	7%	13%	9%	3%	6%	12%	
	Scuba	8%	9%	11%	5%	3%	8%	8%	
	Honeymoon	5%	3%	11%	3%		10%	1%	
	Married/ Attn wedding	4%	1%	3%	4%	15%	6%	2%	
	Golf	4%	1%	3%	3%	15%	7%	1%	
	Visit friends/ Relatives	3%	4%	2%	2%	3%	2%	3%	
	Other	2%	3%	1%	5%		2%	3%	
	Organized sports	2%	1%	1%	3%	6%	2%	2%	
	Company Sponsored	1%	1%	2%			1%	1%	
	Total	Count	349	75	126	109	34	176	173

Motivation by Income

		TOTAL	Q26							
		-	<Y2.0 million	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income
Q5A	Natural beauty	61%	61%	52%	62%	59%	56%	55%	61%	83%
	Pleasure	52%	39%	45%	49%	57%	54%	47%	55%	67%
	Short travel time	48%	28%	30%	51%	51%	57%	47%	63%	50%
	Previous trip	39%	28%	30%	36%	33%	54%	47%	55%	50%
	Relax	38%	39%	32%	26%	45%	34%	38%	42%	50%
	Shopping	38%	56%	36%	28%	41%	36%	30%	32%	67%
	Water sports	26%	22%	30%	38%	27%	21%	15%	32%	33%
	Price	26%	33%	20%	23%	24%	21%	34%	21%	67%
	Safe	22%	17%	11%	8%	22%	25%	32%	34%	50%
	Recomm- friend/family/trvl agnt	17%	28%	18%	10%	22%	16%	15%	13%	33%
	Company/ Business Trip	9%	17%	18%	10%	10%	7%	9%	8%	
	Scuba	8%	17%	11%	3%	8%	8%	6%	5%	
	Honeymoon	5%	6%	7%	10%	8%	7%	2%		
	Married/ Attn wedding	4%		7%	8%	10%	2%	2%		
	Golf	4%		2%	5%	4%	7%	6%	3%	
	Visit friends/ Relatives	3%	6%	7%	3%		3%			
	Other	2%		5%			5%	2%	3%	
	Organized sports	2%		2%		2%	2%	2%	5%	
	Company Sponsored	1%		2%		4%				
	Total Count	349	18	44	39	51	61	47	38	6

SECTION 3 **EXPENDITURES**

Prepaid Expenditures

¥103.58/US\$1

- \$1,494.19 = overall mean average prepaid expense (for entire travel party size) by respondent
- \$0 = minimum (lowest amount recorded for the entire sample)
- \$25,101 = maximum (highest amount recorded for the entire sample)
- \$671.09 = overall mean average per person prepaid expenditures

Prepaid Expenditures Per Person



YTD=\$679.18

Breakdown of Prepaid Expenditures

¥103.58=\$1

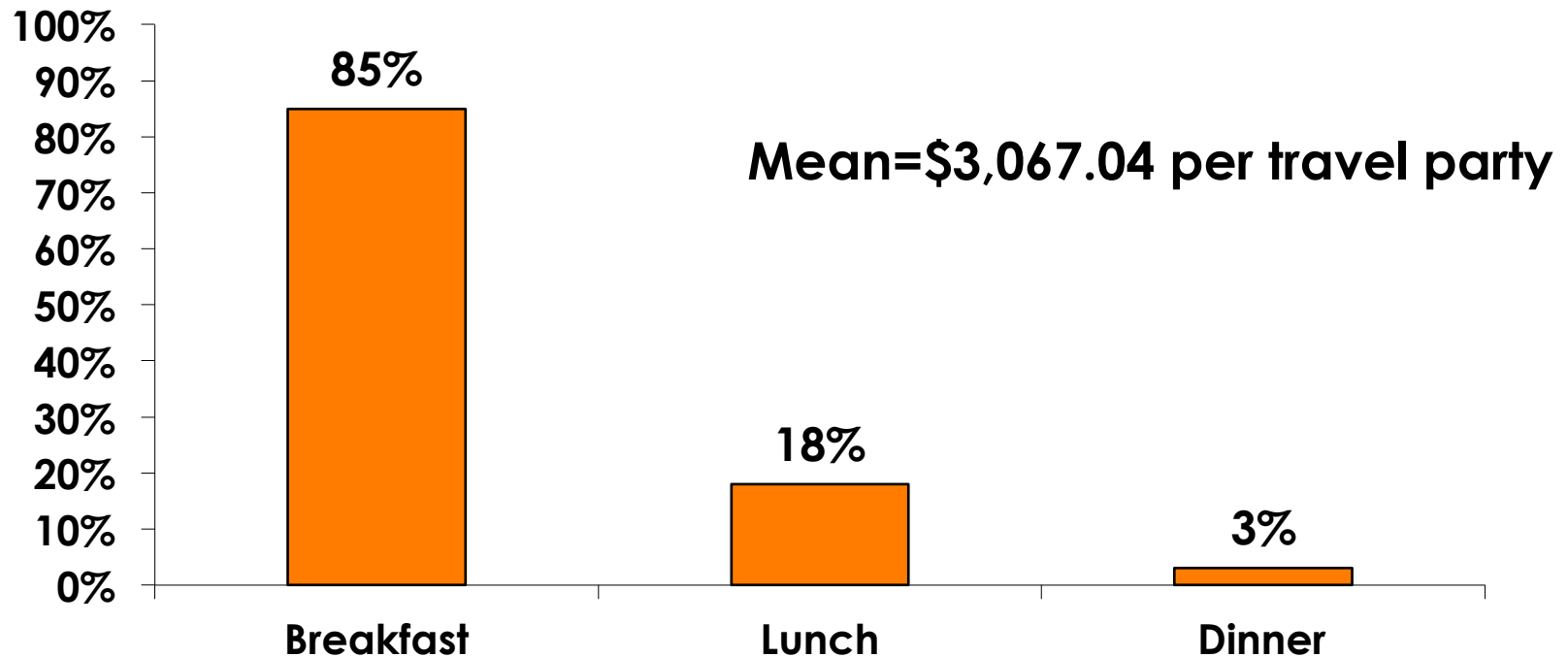
(Filter: Only those who responded/
Per Travel Party)

	MEAN \$
Air & Accommodation package only	\$1,418.93
Air & Accommodation w/ daily meal package	\$3,067.04
Air only	\$1,732.96
Accommodation only	\$761.62
Accommodation w/ daily meal only	\$1,737.79
Food & Beverages in Hotel	\$86.89
Ground transportation – Japan	\$98.59
Ground transportation – Guam	\$212.40
Optional tours/ activities	\$229.92
Other expenses	\$279.86
Total Prepaid	\$1,494.19

Prepaid Meal Breakdown

Air/ Accommodations with Daily Meal Package

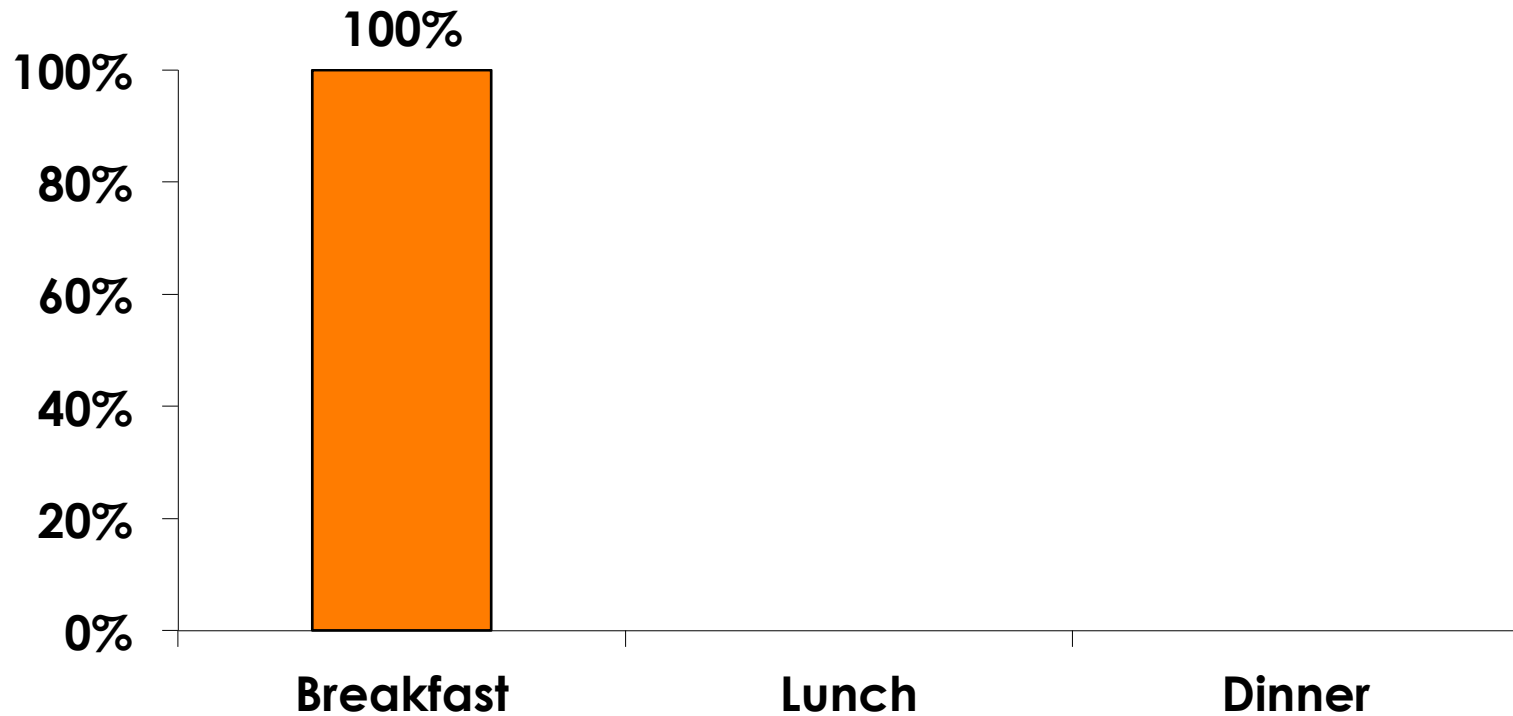
n=39



Prepaid Meal Breakdown

Accommodations with Daily Meal Package

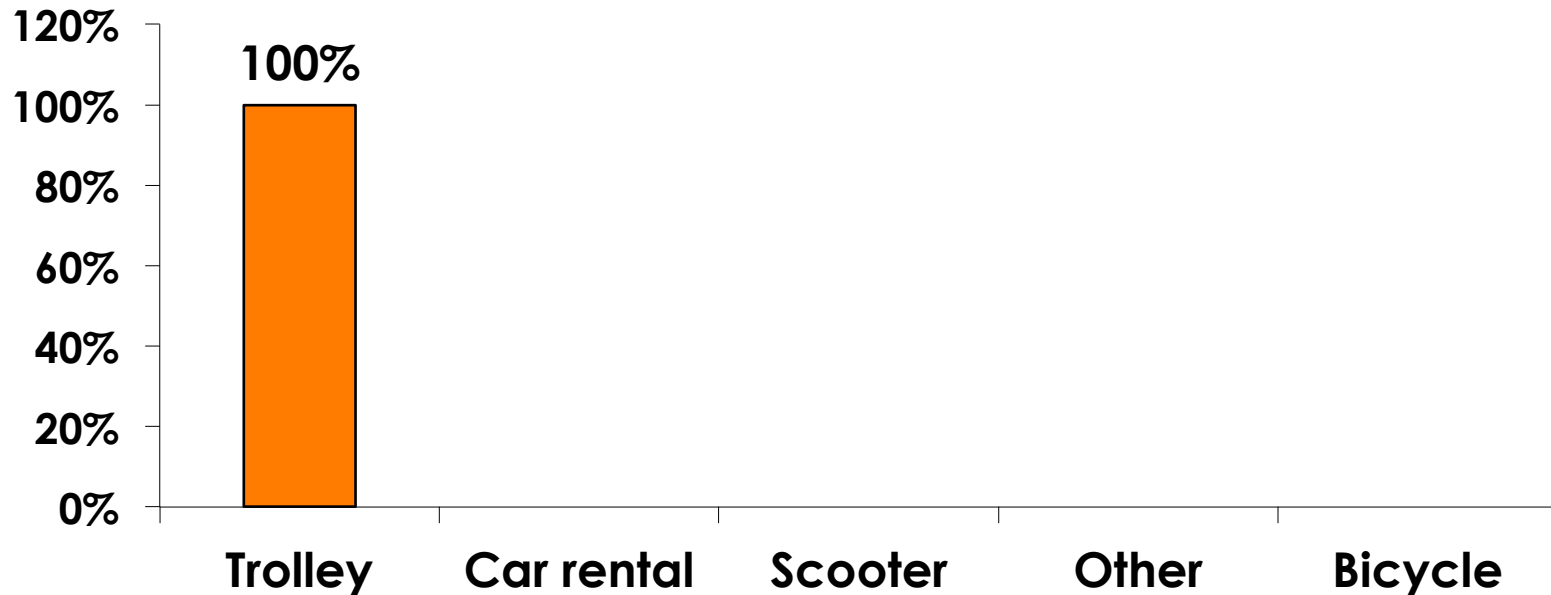
N=1



Mean=\$1,737.79 per travel party

Prepaid Ground Transportation

n=2

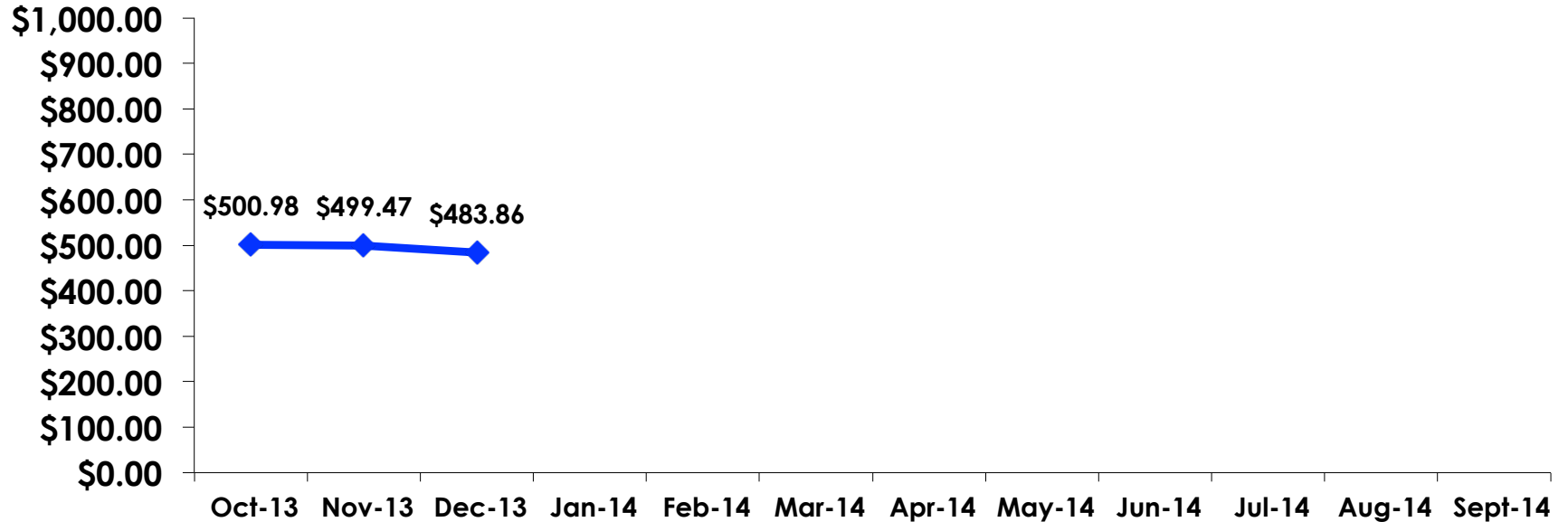


Mean=\$212.40 per travel party

On-Island Expenditures

- \$837.80 = overall mean average on-island expense (for entire travel party size) by respondent
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$7,000 = Maximum (highest amount recorded for the entire sample)
- \$483.86 = overall mean average per person on-island expenditure

On-Island Expenditures Per Person



YTD = \$494.78

Prepaid/ On-Island Expenditures Per Person

Prepaid YTD = \$679.18 On-Island YTD = \$494.78



Total On-Island Expenditure by Gender & Age

		TOTAL	GENDER		GENDER							
					Male				Female			
		-	Male	Female	AGE				AGE			
					18-24	25-34	35-49	50+	18-24	25-34	35-49	50+
PER PERSON	Mean	\$483.86	\$459.91	\$508.09	\$471.92	\$520.51	\$400.41	\$483.03	\$391.50	\$628.08	\$466.89	\$439.50
	Median	\$400	\$355	\$432	\$500	\$500	\$295	\$308	\$337	\$500	\$410	\$433
	Minimum	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
	Maximum	\$5,000	\$3,500	\$5,000	\$1,200	\$3,500	\$3,000	\$1,500	\$1,500	\$5,000	\$1,178	\$1,250

On-Island Expenditure Categories by Gender & Age

		TOTAL	GENDER		AGE			
		-	Male	Female	18-24	25-34	35-49	50+
F&B HOTEL	Mean	\$35.51	\$51.64	\$19.20	\$19.28	\$31.78	\$48.61	\$46.24
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
F&B FF/STORE	Mean	\$43.19	\$51.10	\$35.18	\$33.57	\$41.92	\$56.10	\$31.38
	Median	\$3	\$20	\$0	\$0	\$9	\$10	\$6
F&B RESTRNT	Mean	\$80.99	\$97.58	\$64.21	\$52.67	\$90.99	\$96.96	\$65.59
	Median	\$10	\$28	\$0	\$0	\$40	\$40	\$0
OPT TOUR	Mean	\$74.06	\$93.53	\$54.36	\$55.62	\$71.03	\$89.15	\$86.06
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
GIFT- SELF	Mean	\$211.19	\$221.74	\$200.52	\$82.66	\$272.70	\$263.75	\$118.44
	Median	\$35	\$20	\$50	\$0	\$75	\$100	\$0
GIFT- OTHER	Mean	\$134.57	\$150.59	\$118.37	\$84.17	\$141.83	\$141.03	\$217.65
	Median	\$50	\$65	\$50	\$30	\$50	\$100	\$125
TRANS	Mean	\$23.50	\$36.20	\$10.57	\$3.72	\$32.18	\$28.18	\$23.79
	Median	\$0	\$0	\$0	\$0	\$0	\$0	\$0
OTHER	Mean	\$233.31	\$246.77	\$219.69	\$190.18	\$132.29	\$343.26	\$339.41
	Median	\$0	\$0	\$0	\$1	\$0	\$0	\$0
TOTAL	Mean	\$837.80	\$950.71	\$723.60	\$524.67	\$817.36	\$1,066.77	\$928.56
	Median	\$600	\$700	\$500	\$500	\$600	\$820	\$500

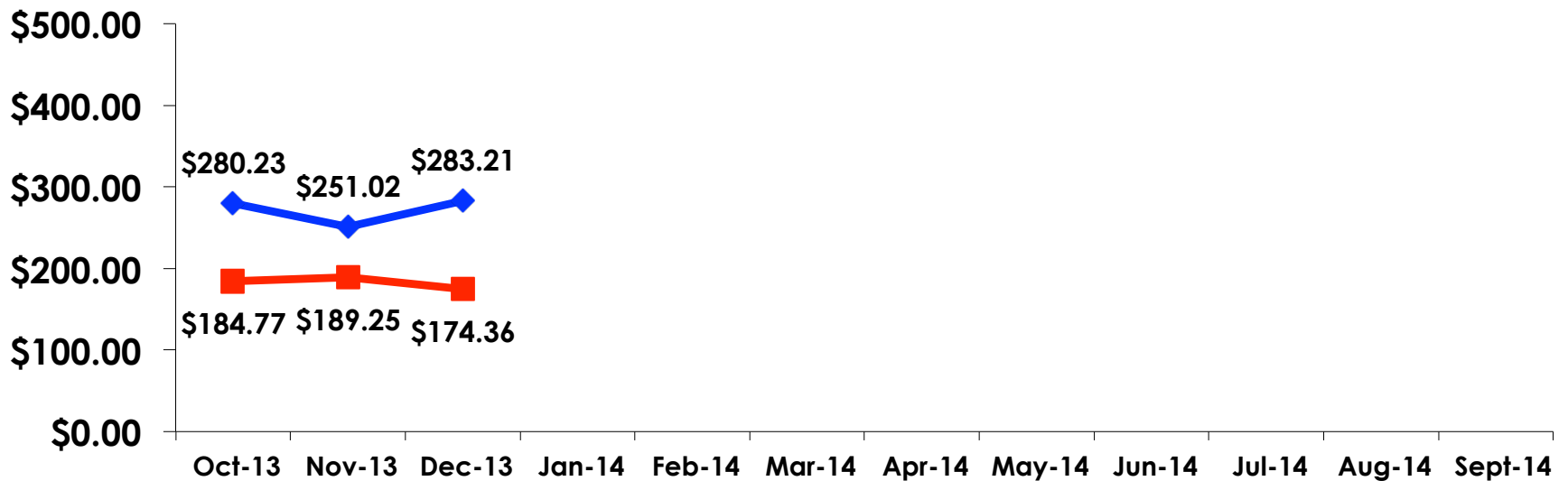
On-Island Expenditures

First Timers & Repeaters

		TOTAL	TRIPS TO GUAM	
		-	1st	Repeat
F&B HOTEL	Mean	\$35.51	\$22.24	\$47.77
	Median	\$0	\$0	\$0
F&B FF/STORE	Mean	\$43.19	\$42.04	\$44.61
	Median	\$3	\$6	\$0
F&B RESTRNT	Mean	\$80.99	\$77.36	\$85.16
	Median	\$10	\$13	\$0
OPT TOUR	Mean	\$74.06	\$65.65	\$83.03
	Median	\$0	\$0	\$0
GIFT- SELF	Mean	\$211.19	\$154.24	\$270.35
	Median	\$35	\$20	\$50
GIFT- OTHER	Mean	\$134.57	\$123.17	\$145.50
	Median	\$50	\$50	\$50
TRANS	Mean	\$23.50	\$20.59	\$26.60
	Median	\$0	\$0	\$0
OTHER	Mean	\$233.31	\$198.22	\$270.35
	Median	\$0	\$0	\$0
TOTAL	Mean	\$837.80	\$706.44	\$973.40
	Median	\$600	\$550	\$648

On-Island Expenditures Per Day

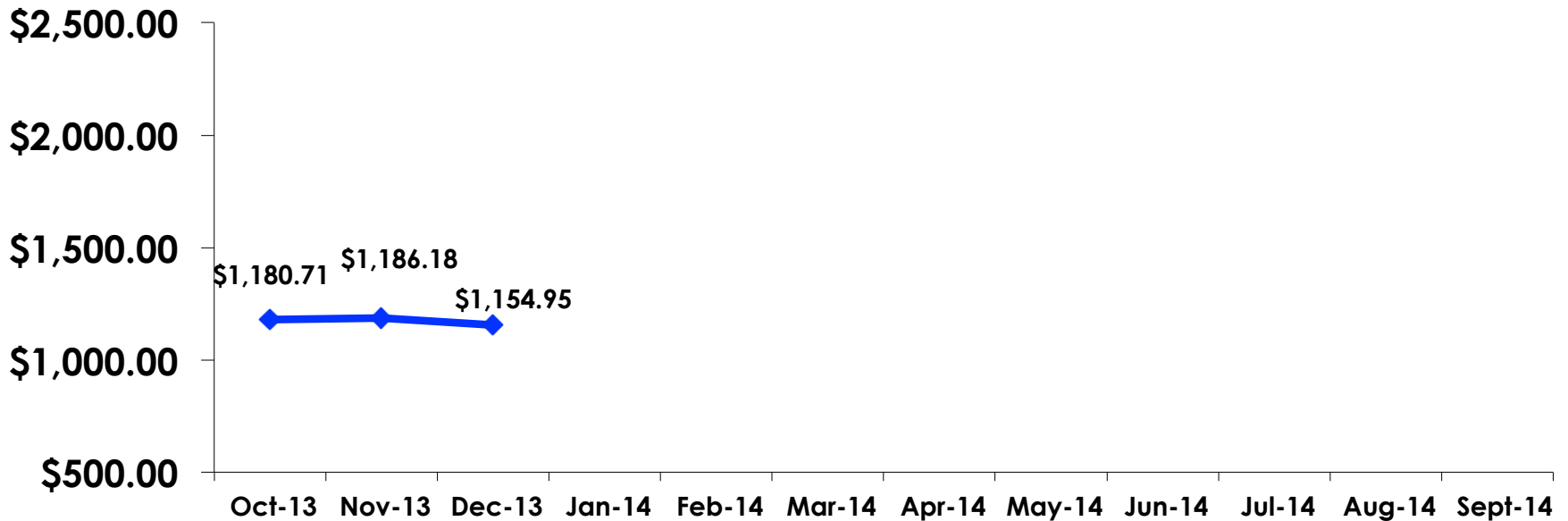
Travel Party YTD = \$271.48 Per Person YTD = \$182.79



Total Expenditures Per Person (Prepaid & On-Island)

- \$1,154.95 = overall average
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$5,483 = Maximum (highest amount recorded for the entire sample)

Total Expenditures Per Person



YTD=\$1,173.95

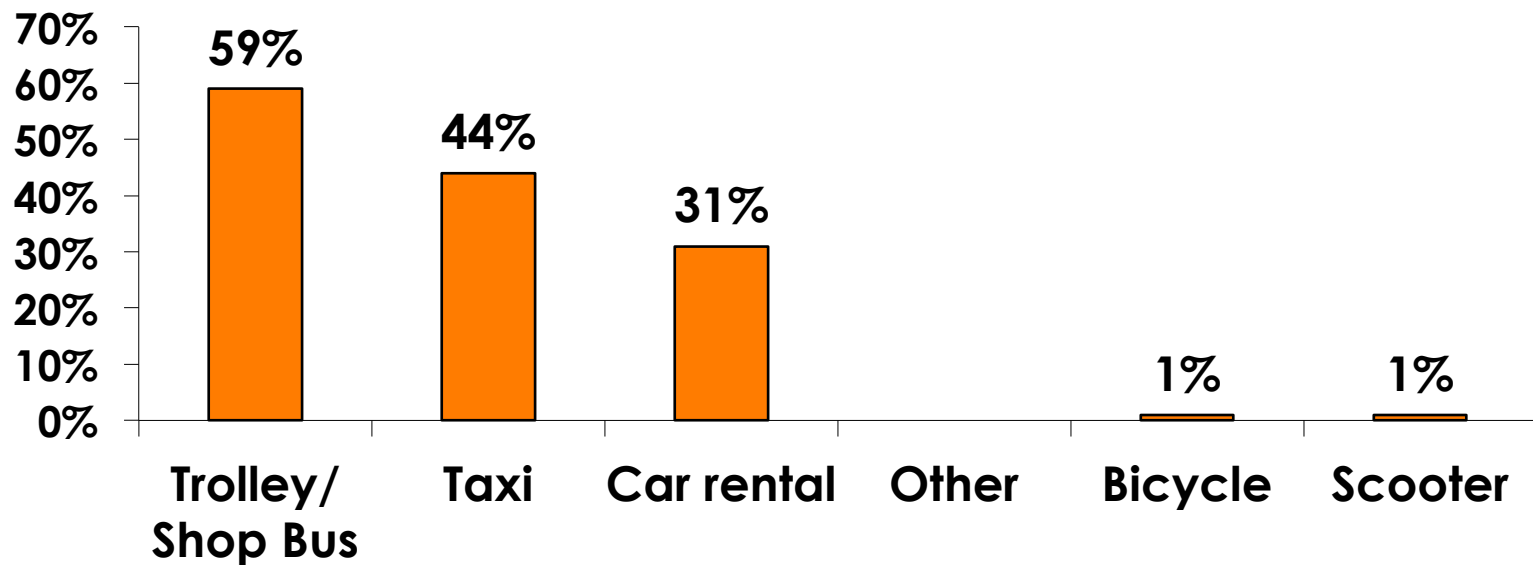
Breakdown of On-Island Expenditures

	MEAN \$
Food & beverage in a hotel	\$35.51
Food & beverage in fast food restaurant/ convenience store	\$43.19
Food & beverage at restaurants or drinking establishments outside a hotel	\$80.99
Optional tours and activities	\$74.06
Gifts/ souvenirs for yourself/companions	\$211.19
Gifts/ souvenirs for friends/family at home	\$134.57
Local transportation	\$23.50
Other expenses not covered	\$233.31
Average Total	\$837.80

Local Transportation

n=75

Mean=\$23.50 per travel party



Guam Airport Expenditures

- \$22.62 = Mean
- \$5 = Median
- \$0 = Minimum (lowest amount recorded for the entire sample)
- \$820 = Maximum (highest amount recorded for the entire sample)

Breakdown of Airport Expenditures

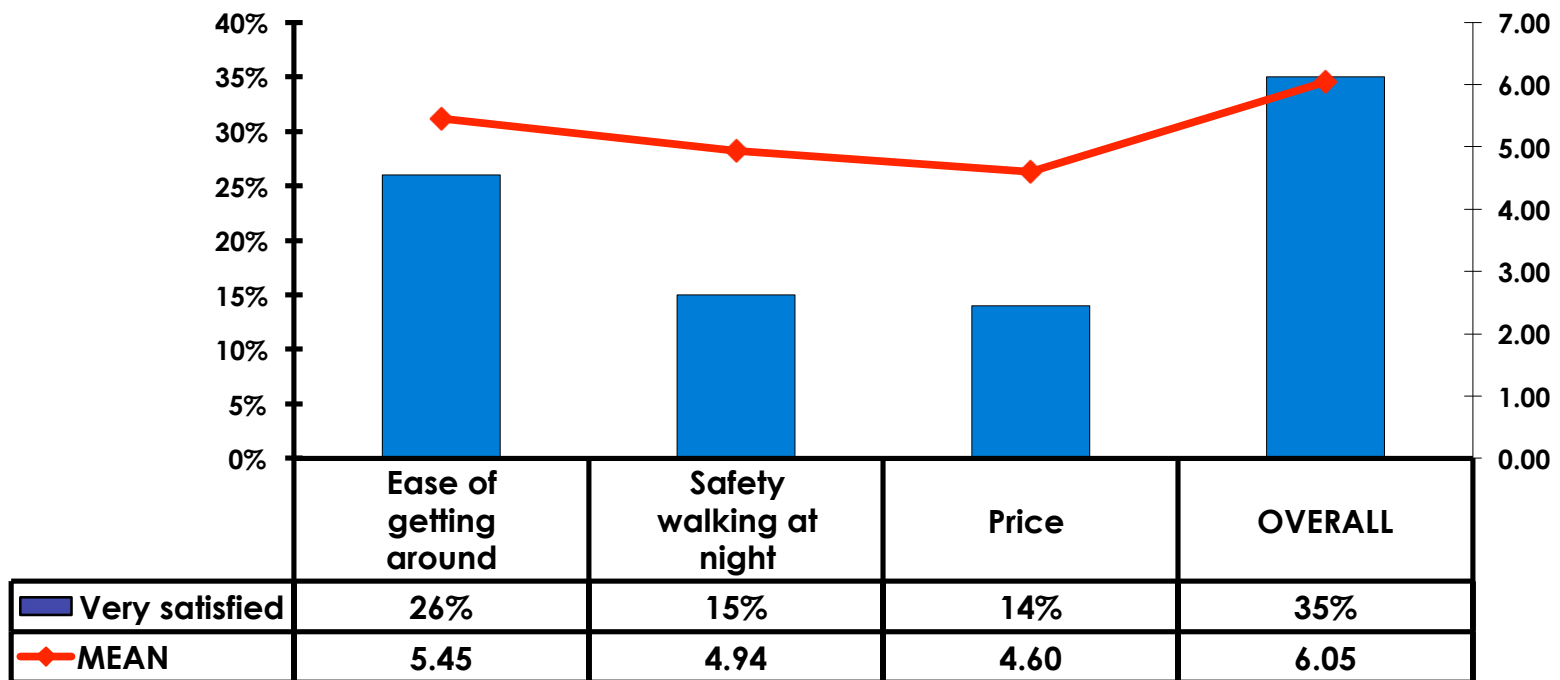
	MEAN \$
Food & Beverages	\$7.69
Gifts/Souvenirs Self	\$8.22
Gifts/Souvenirs Others	\$6.71
Total	\$22.62

SECTION 4 **VISITOR SATISFACTION**

Satisfaction Scores Overall

7pt Rating Scale

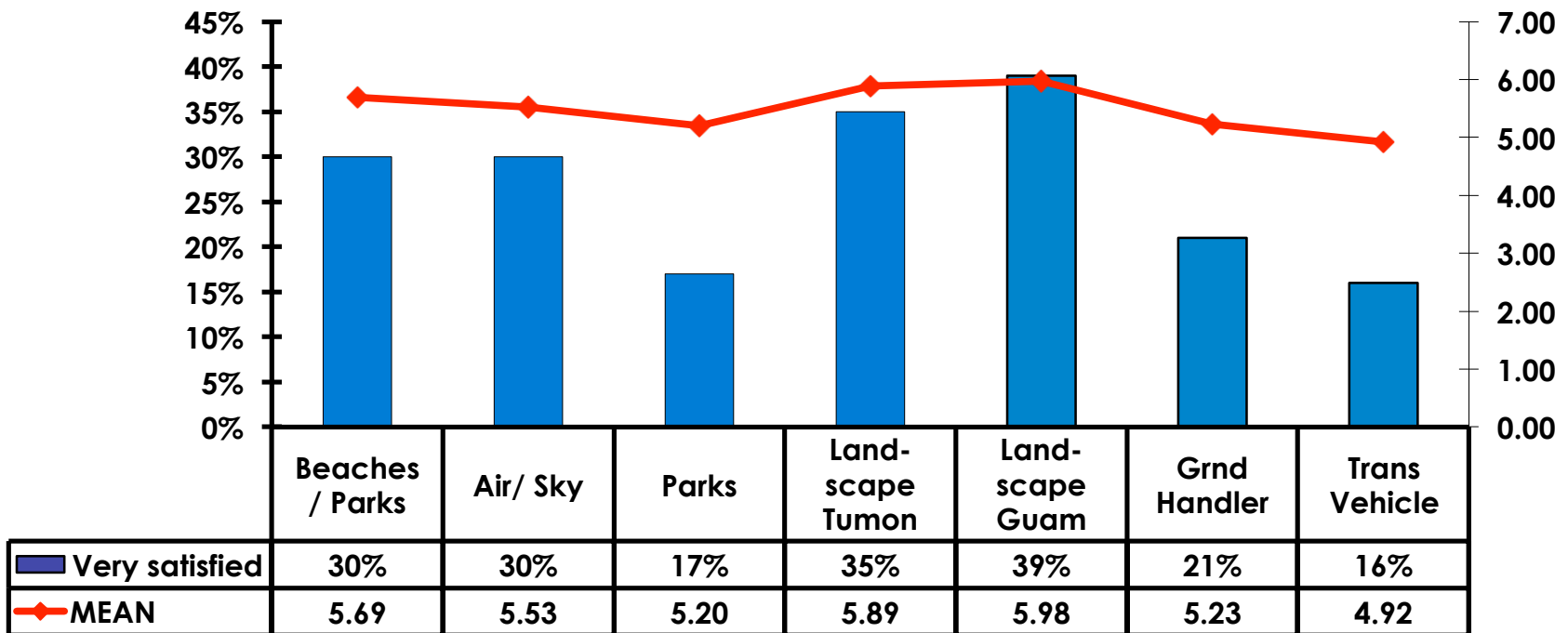
7=Very Satisfied/1=Very Dissatisfied



Satisfaction Quality/ Cleanliness

7pt Rating Scale

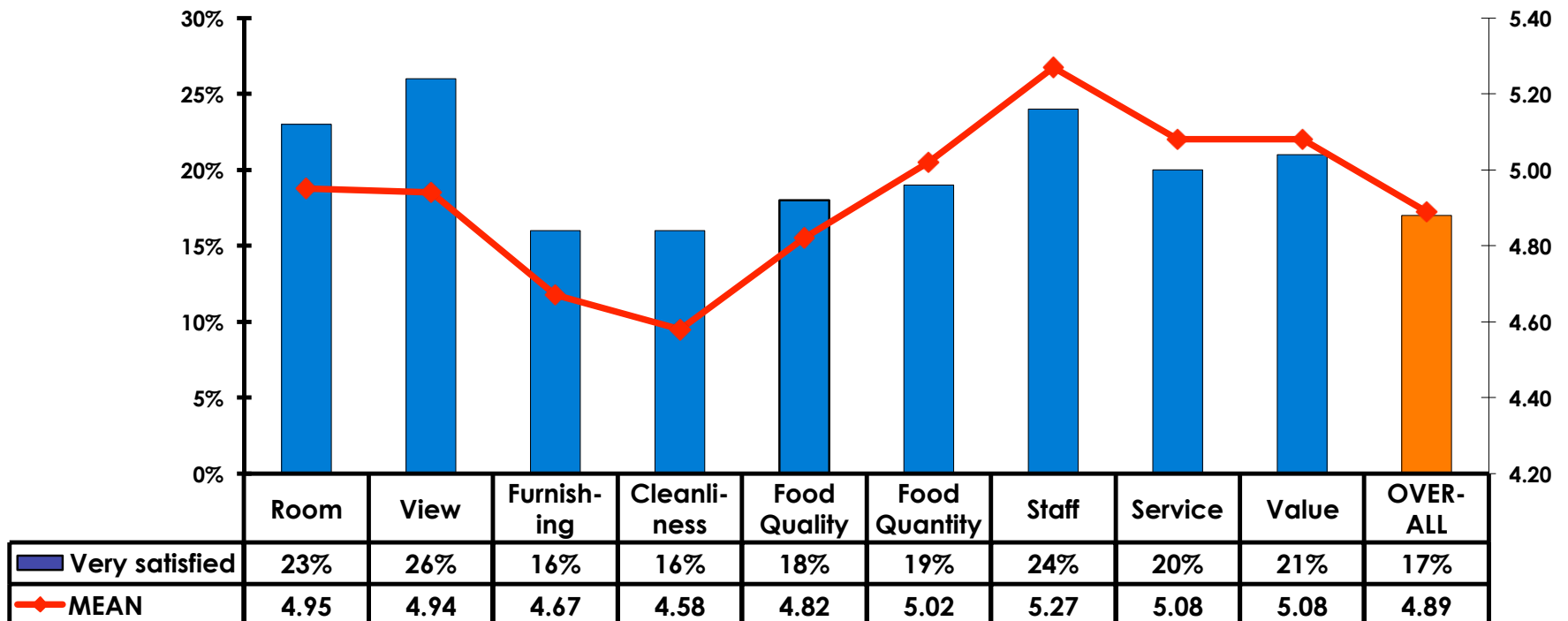
7=Very Satisfied/1=Very Dissatisfied



Quality of Accommodations

7pt Rating Scale

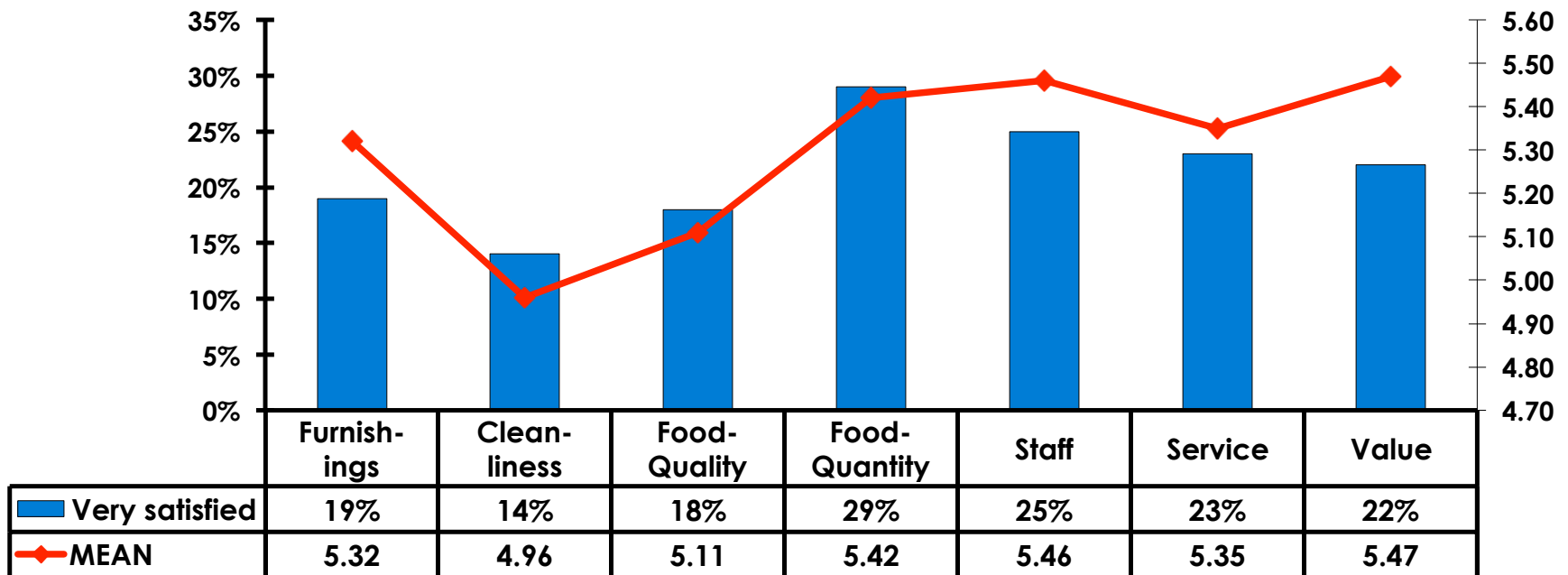
7=Very Satisfied/1=Very Dissatisfied



Quality of Dining Experience

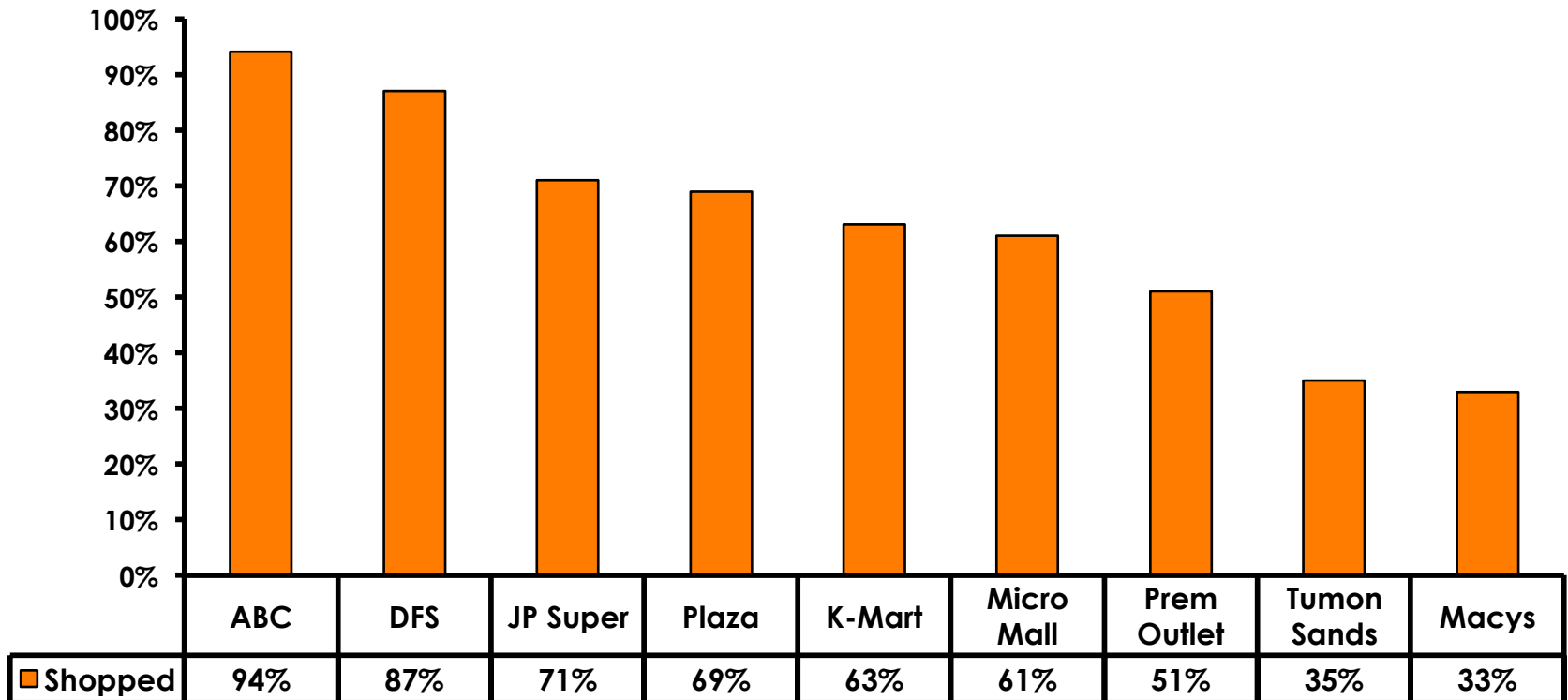
7pt Rating Scale

7=Very Satisfied/1=Very Dissatisfied



Visits to Shopping Centers/Malls on Guam

Top responses



Satisfaction with Shopping

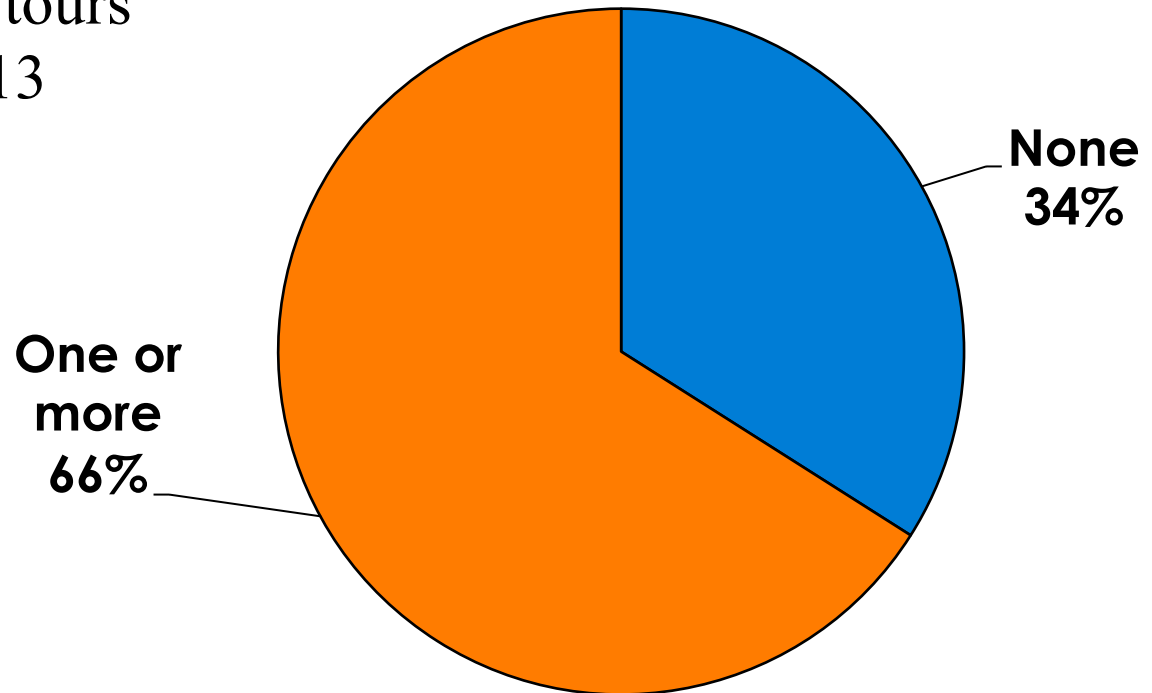
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

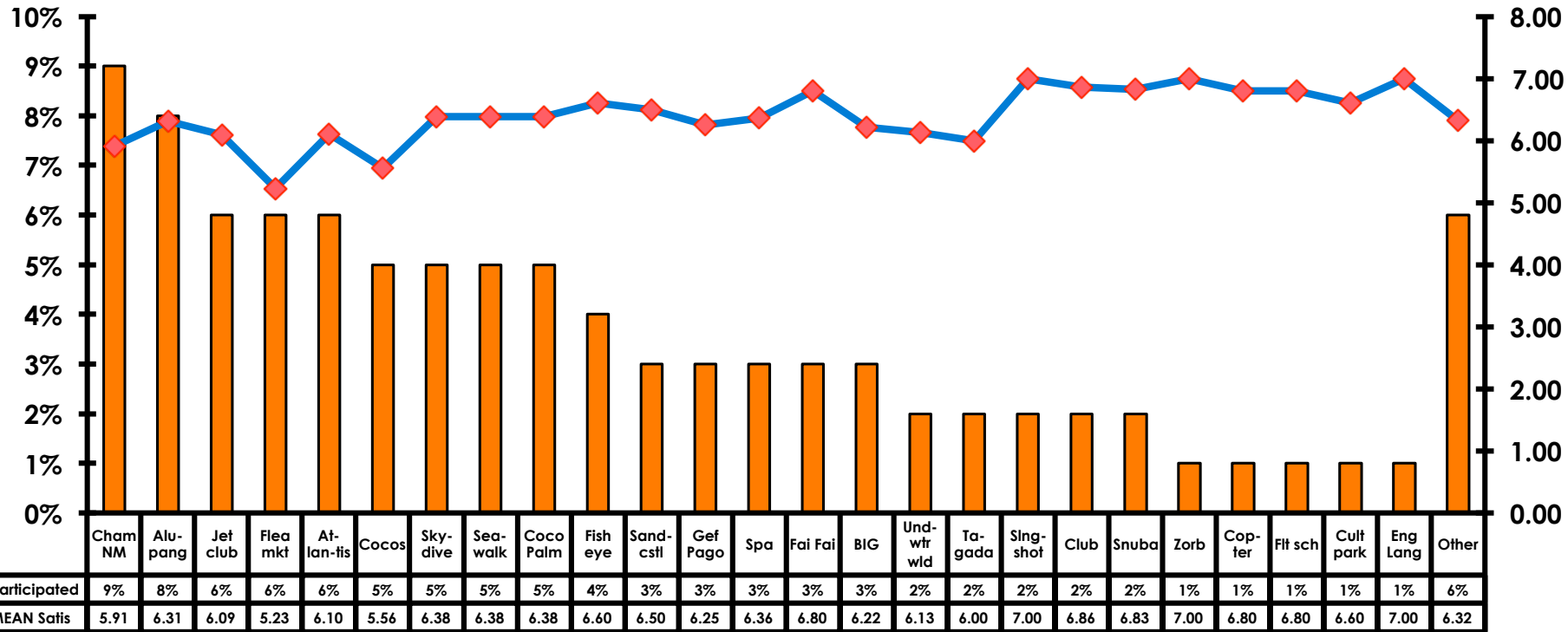
Quality of Shopping	Variety of Shopping
Score of 6 to 7 = 56%	Score of 6 to 7 = 54%
Score of 4 to 5 = 41%	Score of 4 to 5 = 42%
Score 1 to 3 = 3%	Score 1 to 3 = 4%
MEAN = 5.52	MEAN = 5.47

Optional Tour Participation

- Average number of tours participated in is 1.13



Optional Tours Participation & Satisfaction



Day Tours Satisfaction

7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied

Quality of Day Tour	Variety of Day Tour
Score of 6 to 7 = 54%	Score of 6 to 7 = 53%
Score of 4 to 5 = 45%	Score of 4 to 5 = 45%
Score 1 to 3 = 2%	Score 1 to 3 = 2%
MEAN = 5.43	MEAN = 5.45

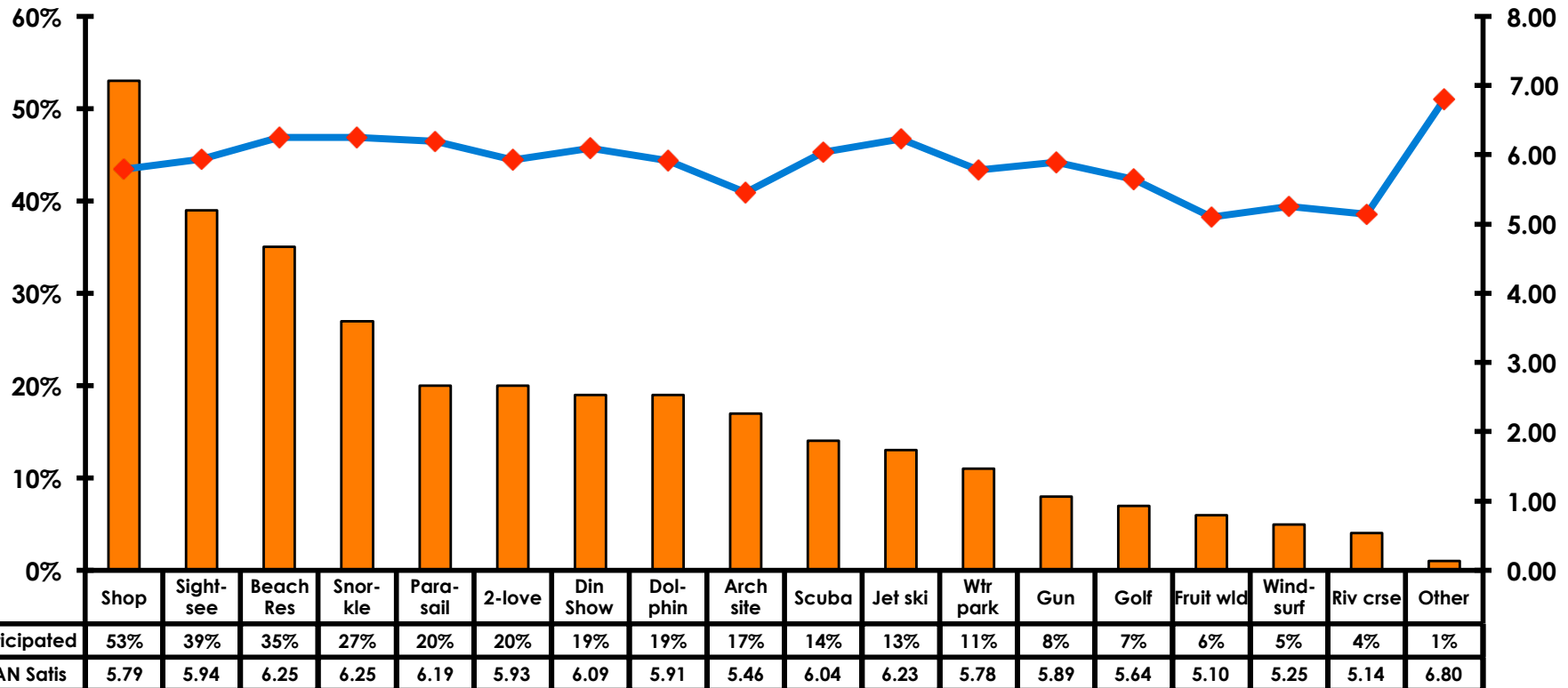
Night Tours Satisfaction

7pt Rating Scale

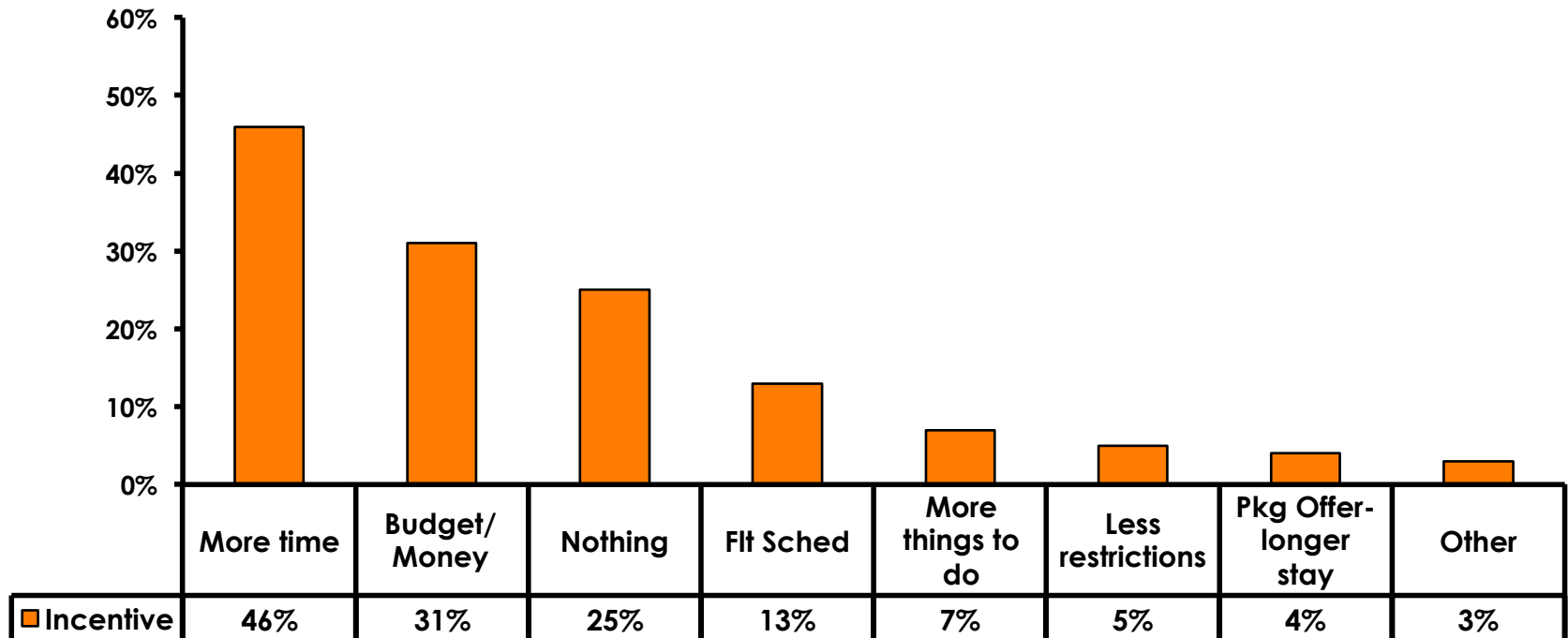
7=Very Satisfied/ 1=Very Dissatisfied

Quality of Night Tour	Variety of Night Tour
Score of 6 to 7 = 29%	Score of 6 to 7 = 28%
Score of 4 to 5 = 69%	Score of 4 to 5 = 70%
Score 1 to 3 = 3%	Score 1 to 3 = 3%
MEAN = 4.74	MEAN = 4.74

Satisfaction with Other Activities



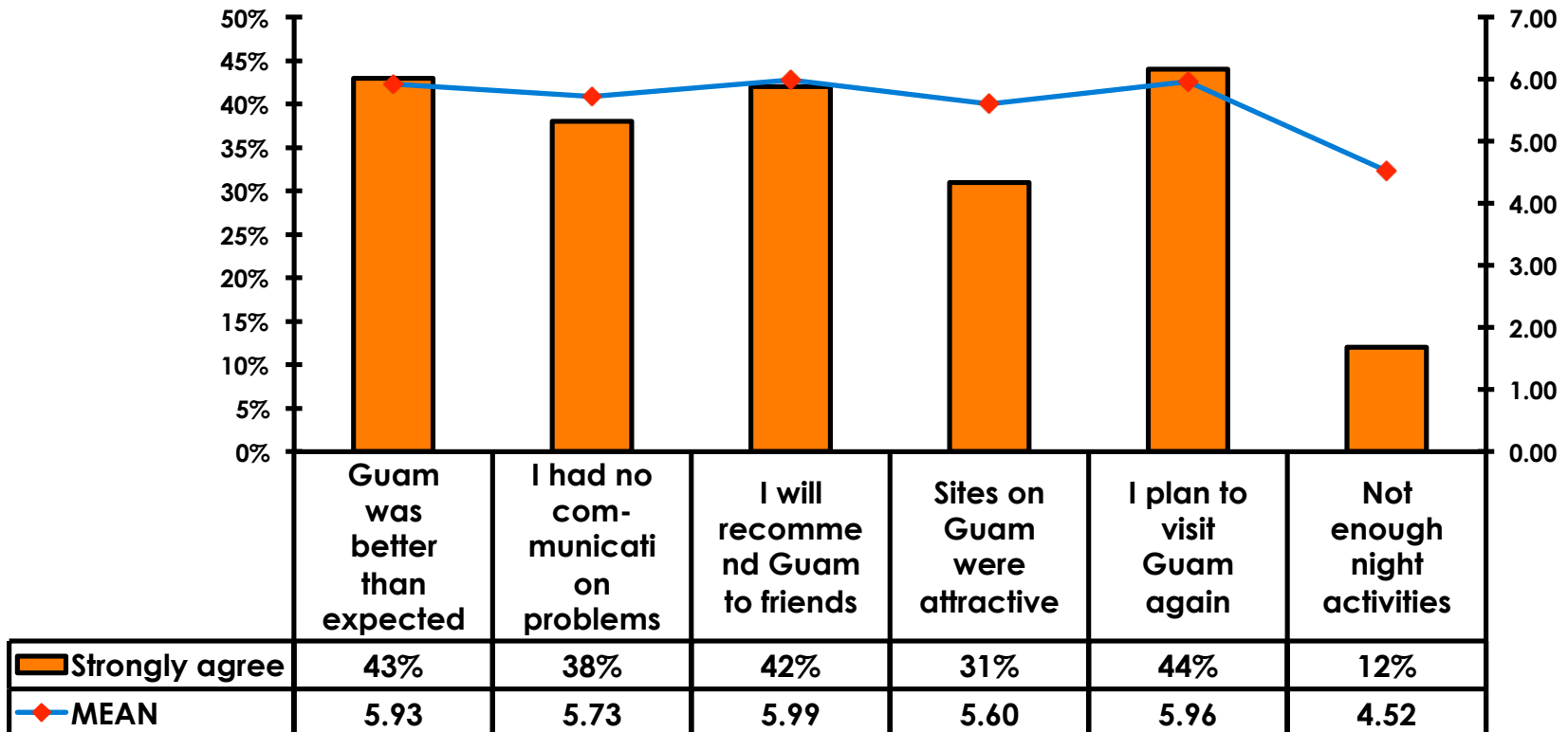
What would it take to make you want to stay an extra day in Guam?



On-Island Perceptions

7pt Rating Scale

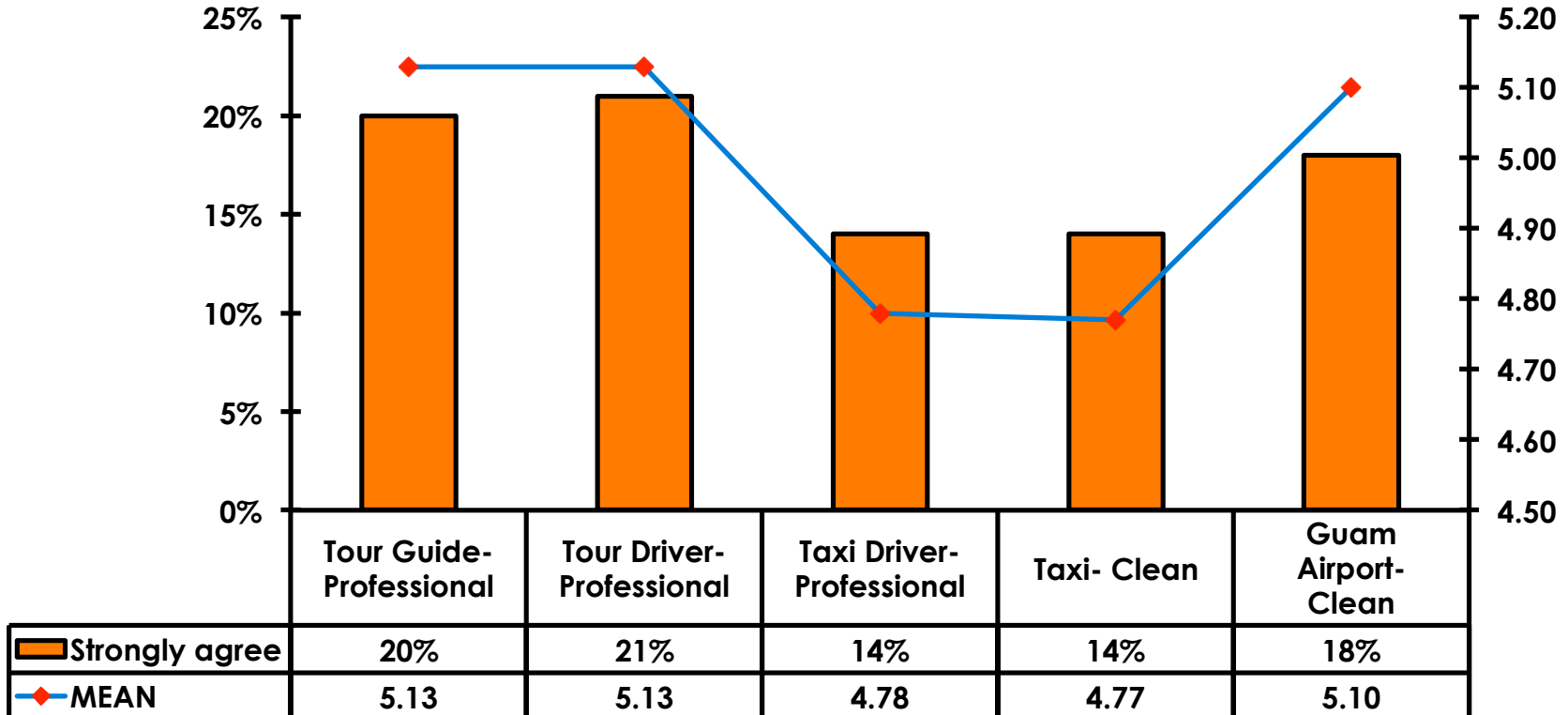
7=Very Satisfied/ 1=Very Dissatisfied



On-Island Perceptions

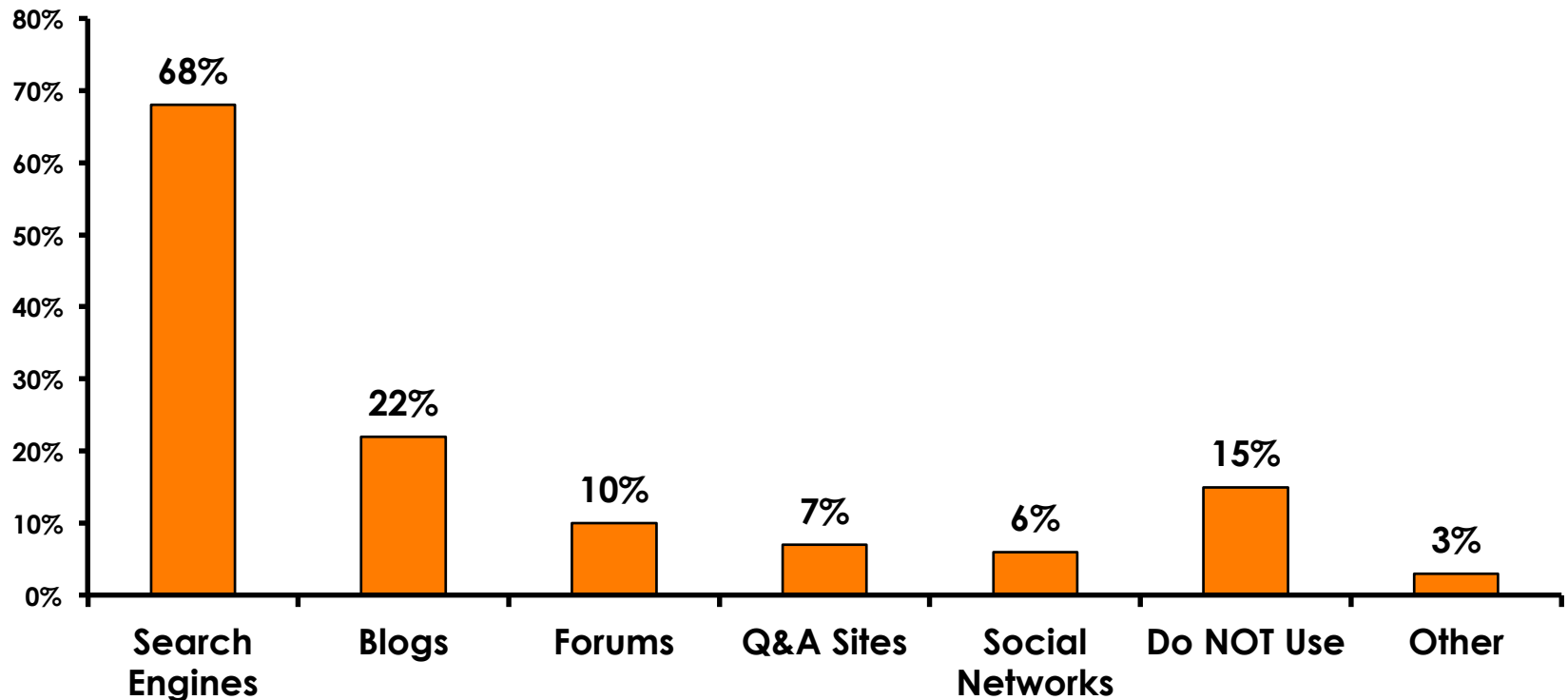
7pt Rating Scale

7=Very Satisfied/ 1=Very Dissatisfied



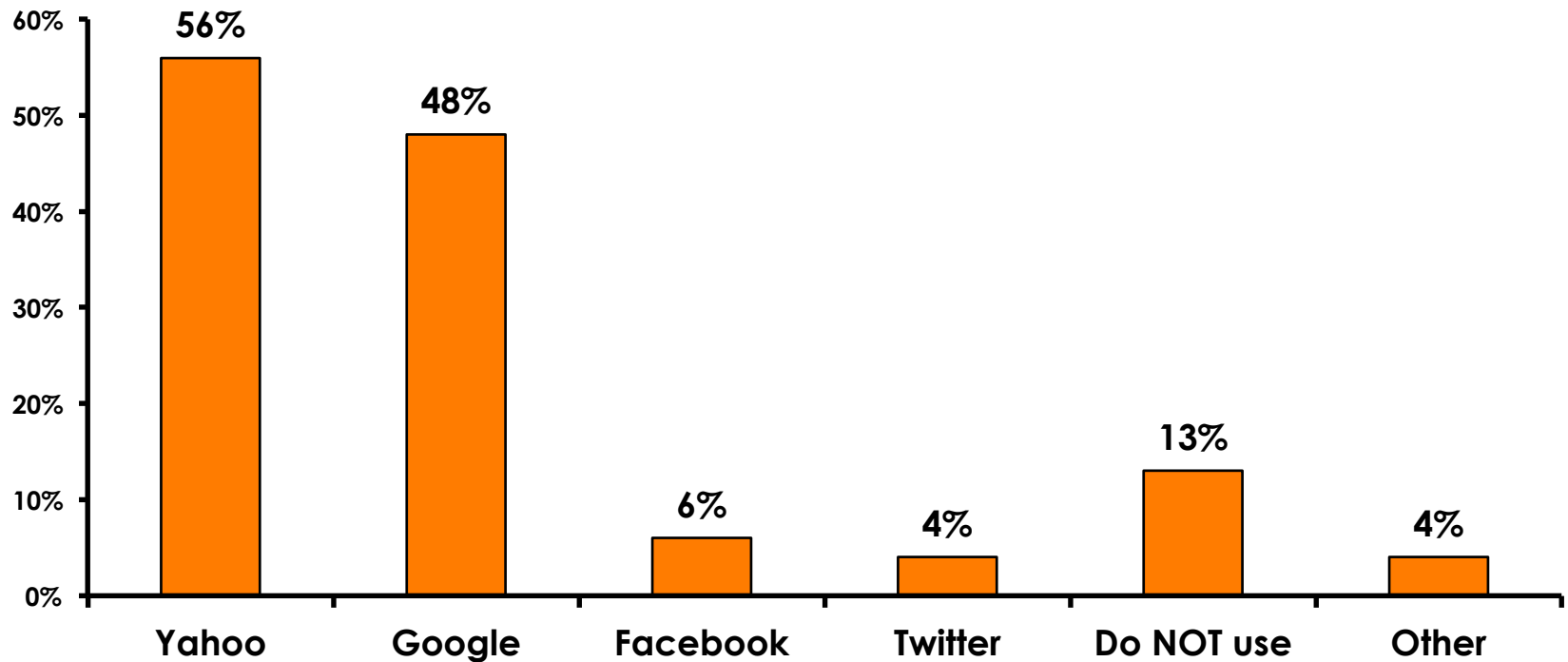
SECTION 5 **PROMOTIONS**

Internet- Guam Sources of Info

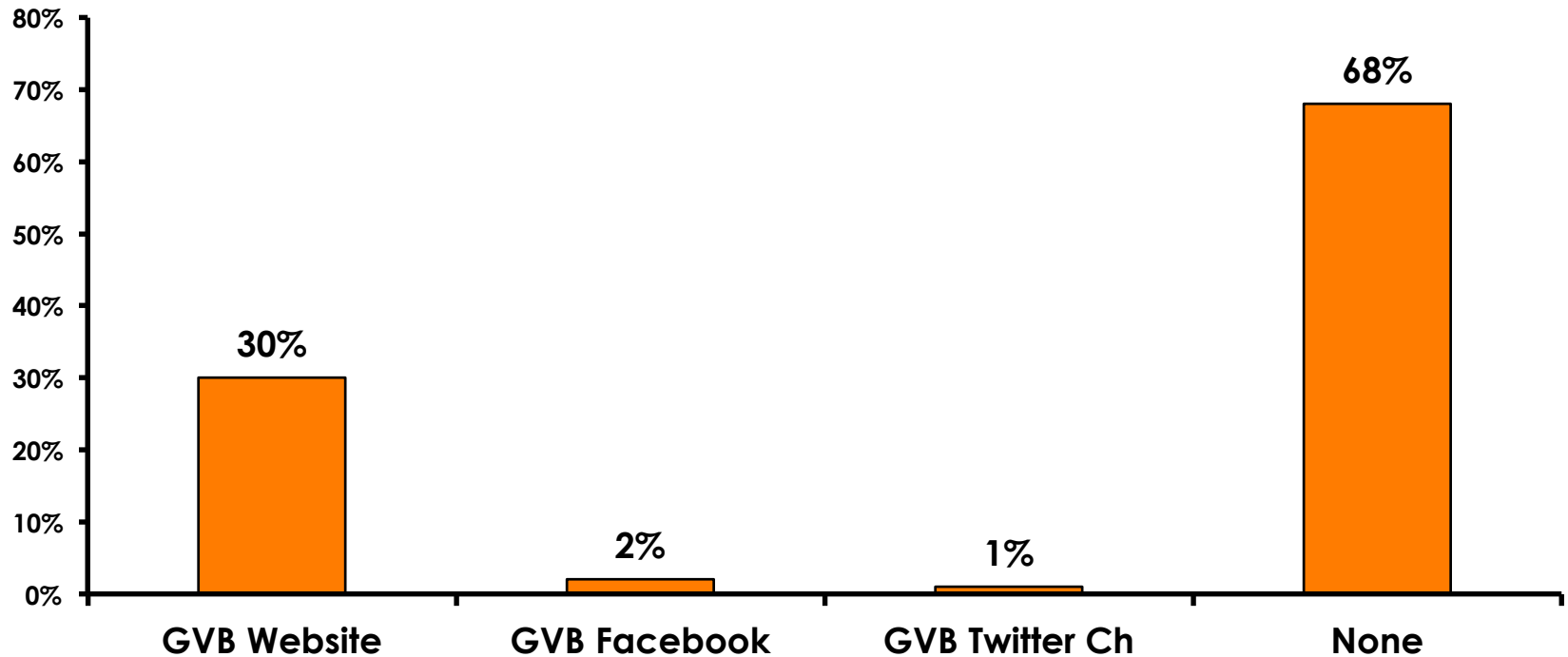


Internet- Things To Do

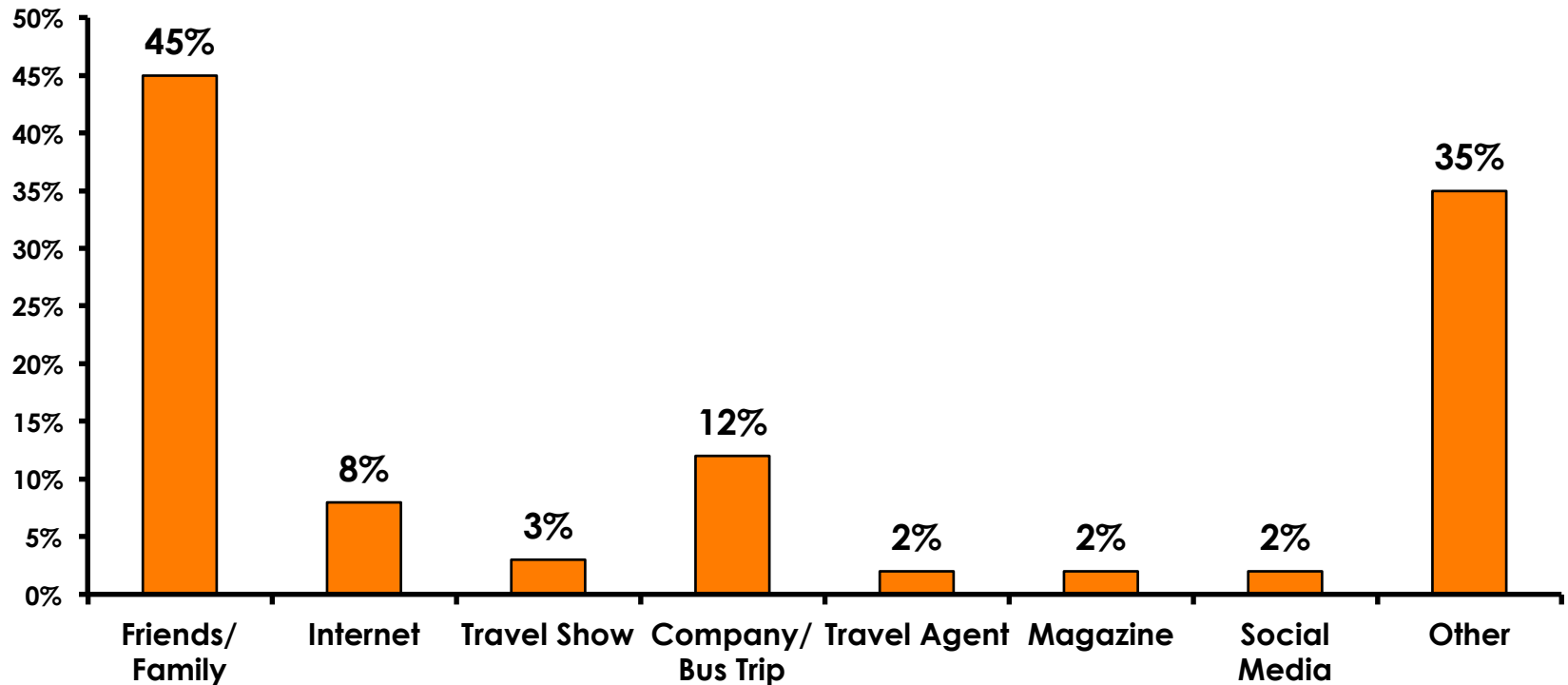
Sources of Info



Internet- GVB Sources

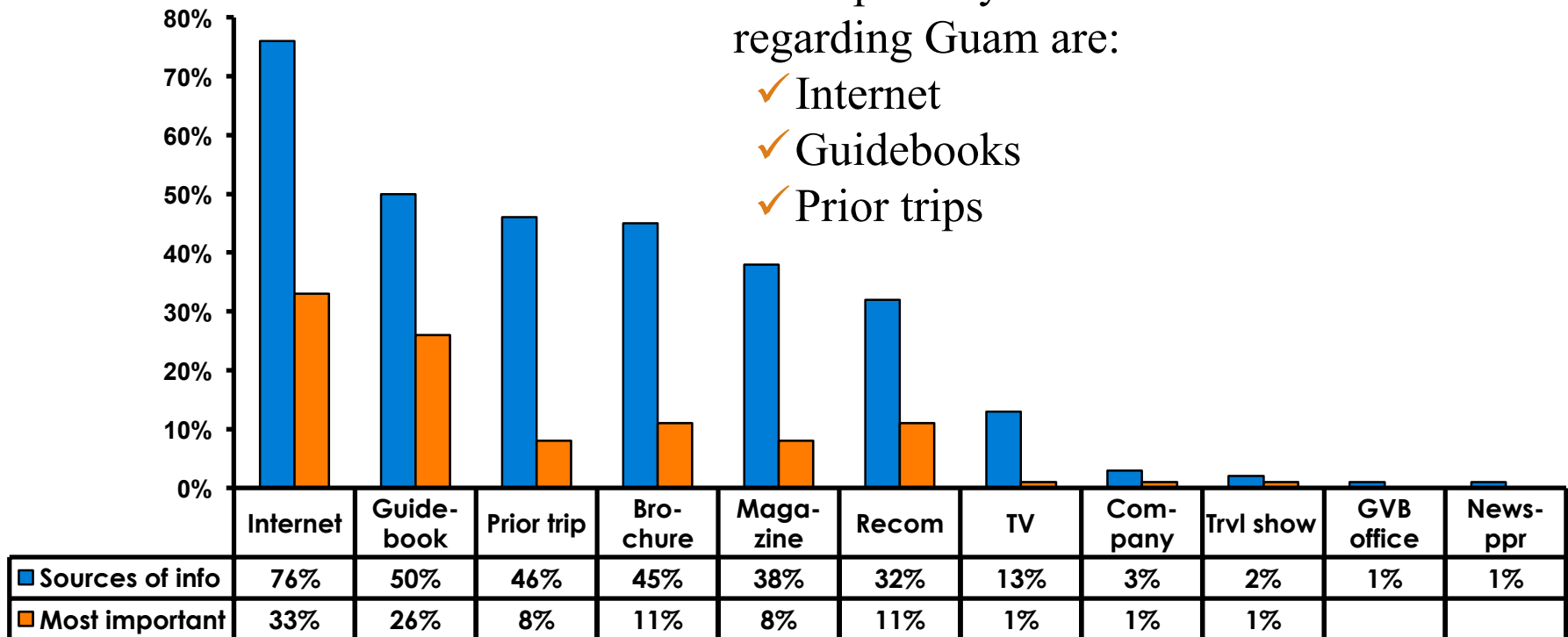


Travel Motivation- Info Sources



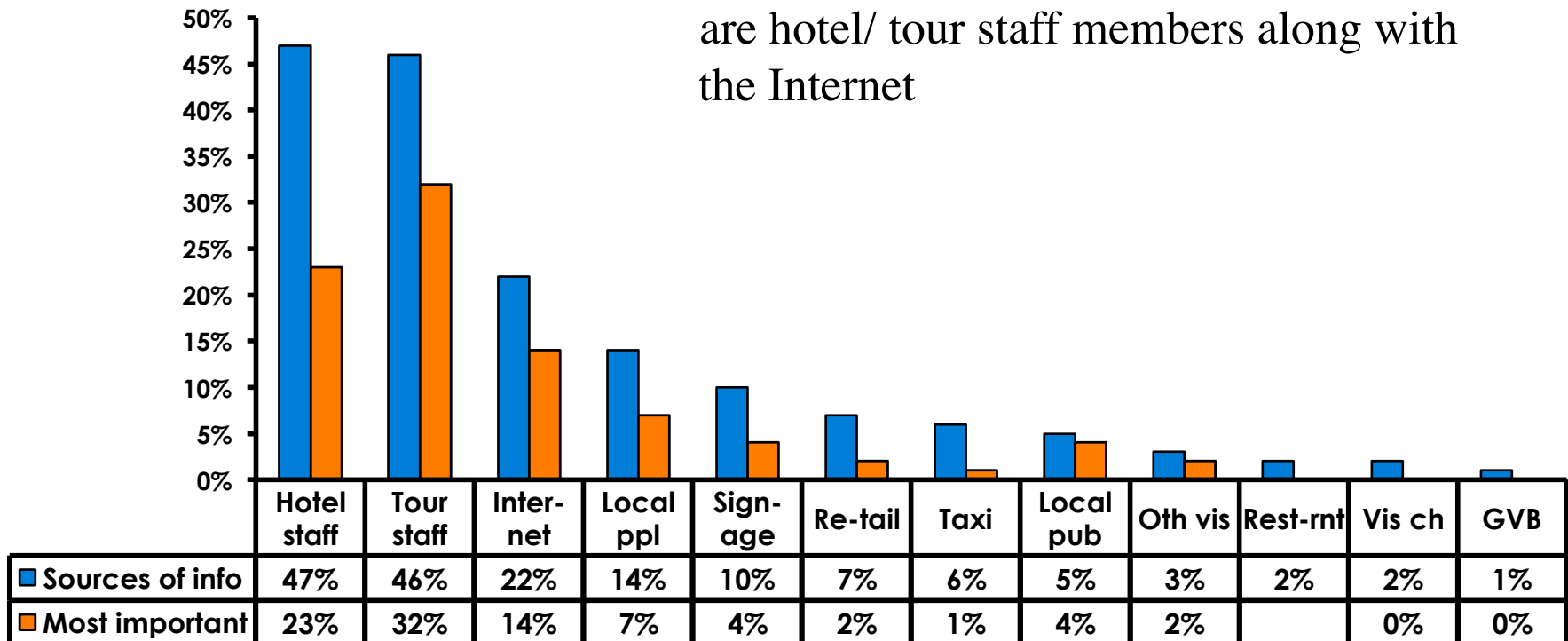
Sources of Information Pre-arrival

- The 3 primary sources of information regarding Guam are:
 - ✓ Internet
 - ✓ Guidebooks
 - ✓ Prior trips



Sources of Information Post-arrival

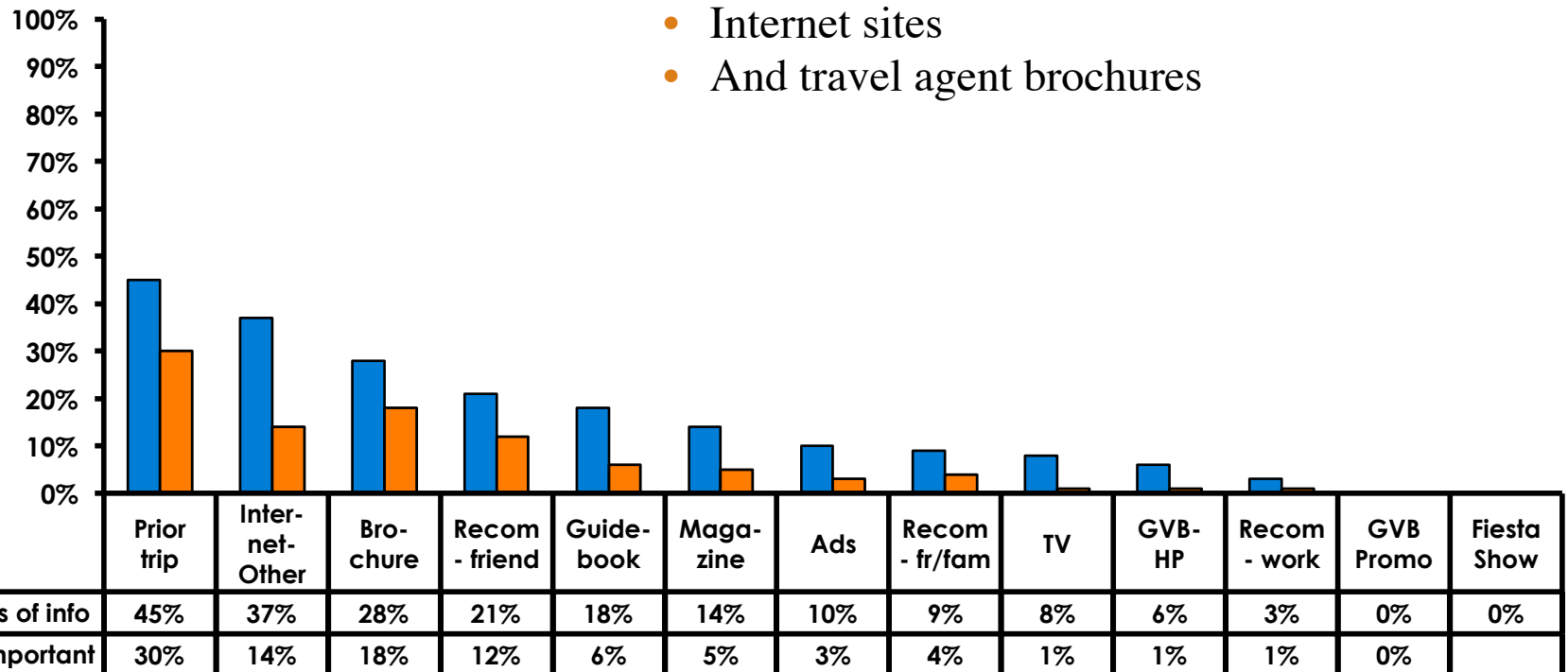
- The primary local source of information are hotel/ tour staff members along with the Internet



Sources of Information - Motivation

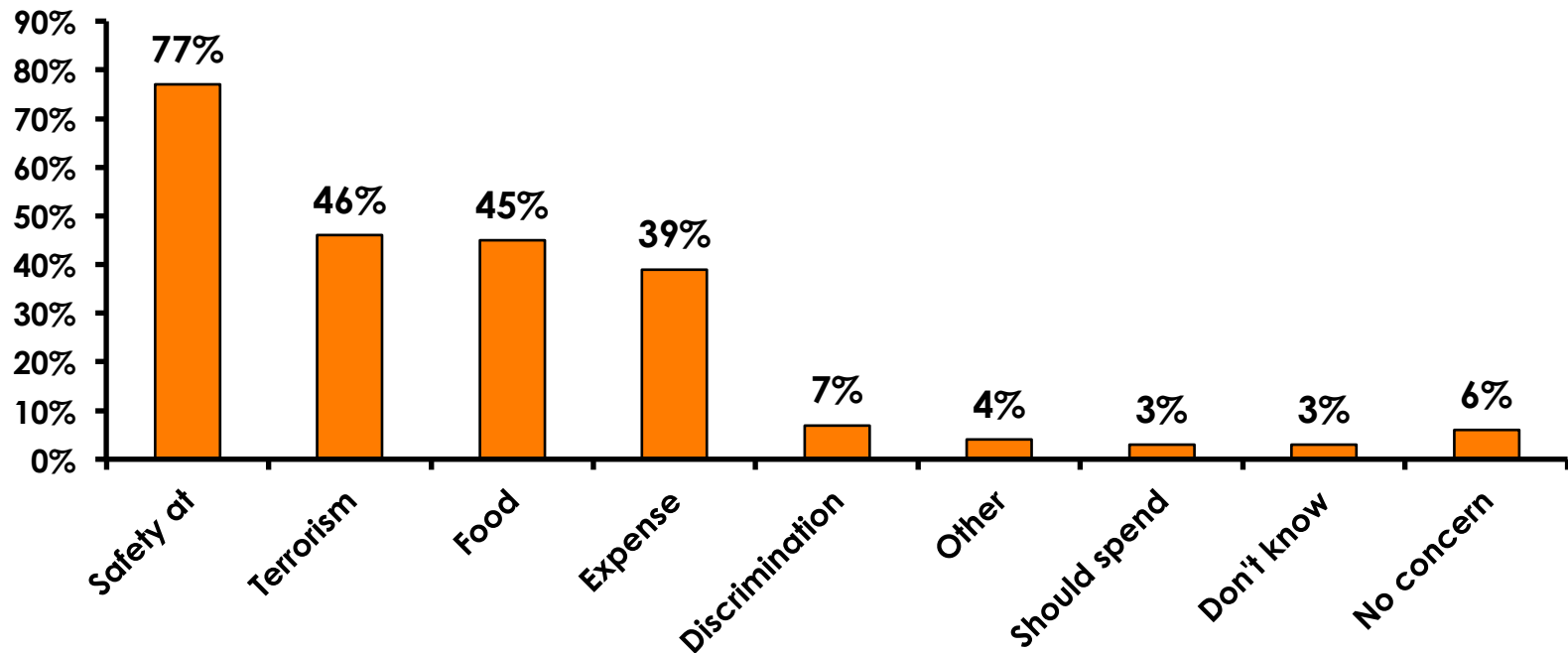
The primary motivational sources of information were.

- Prior trip to Guam,
- Internet sites
- And travel agent brochures



SECTION 6 **OTHER ISSUES**

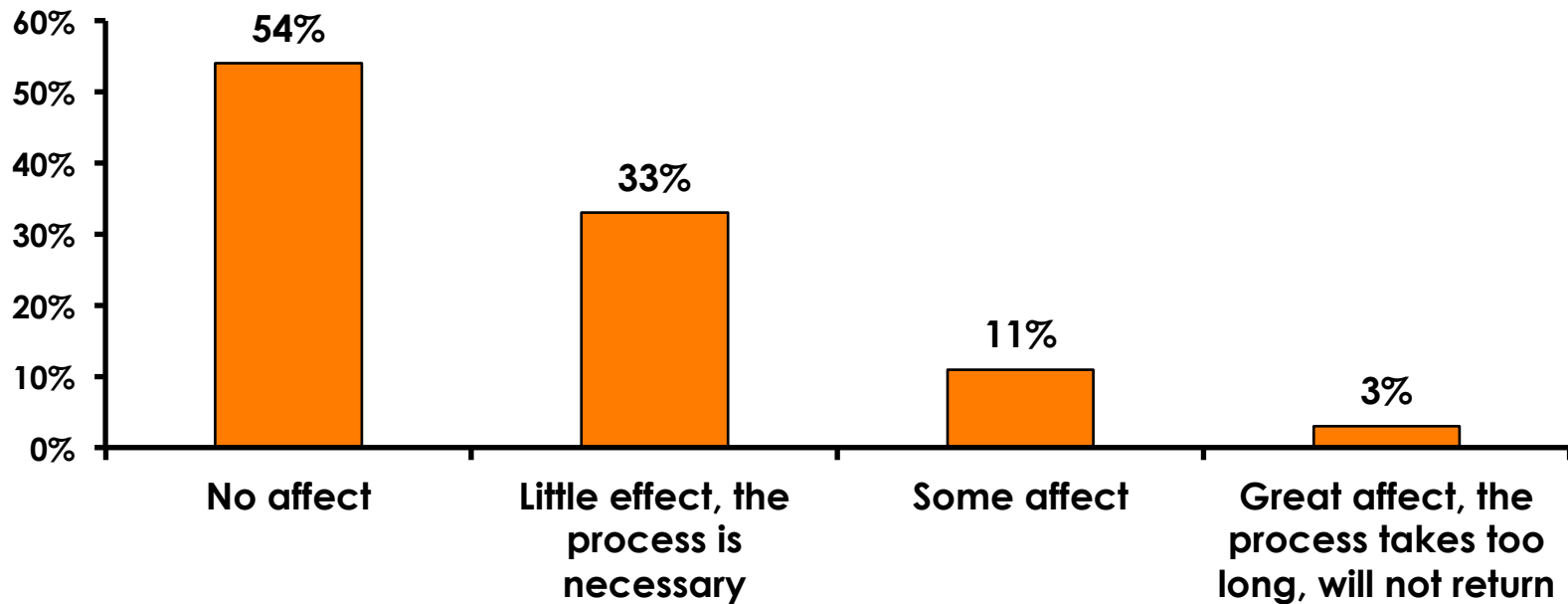
Concerns about travel outside of Japan - Overall



Concerns about travel outside of Japan - By Age & Income

		TOTAL	AGE				Q26								
		-	18-24	25-34	35-49	50+	<Y2.0 million	Y2.0M-Y3.0M	Y3.0M-Y4.0M	Y4.0M-Y5.0M	Y5.0M-Y7.0M	Y7.0M-Y10.0M	Y10.0M+	No Income	
Q21	Safety	77%	70%	86%	75%	74%	89%	75%	76%	86%	79%	68%	79%	67%	
	Terrorism	46%	45%	53%	44%	38%	53%	57%	50%	57%	54%	23%	39%	50%	
	Food	45%	49%	50%	36%	41%	53%	52%	50%	45%	43%	34%	42%	83%	
	Expense	39%	38%	45%	41%	18%	42%	34%	50%	43%	43%	28%	39%	50%	
	Discrimination against Japanese	7%	8%	11%	4%		11%	5%	16%	4%	10%	4%	5%	17%	
	No concerns	6%	5%	4%	10%	6%		2%	8%	2%	10%	13%	13%		
	Other	4%	5%	5%	4%	3%			8%	2%	7%	9%	3%		
	Don't know	3%	3%	3%	4%	3%	11%			4%		2%	3%		
	Should spend at home	3%	1%	3%	3%	3%	5%		5%	4%	2%	2%	3%	17%	
	Total	Count	348	76	125	108	34	19	44	38	51	61	47	38	6

Security Screening/ Immigration Process at Guam International Airport



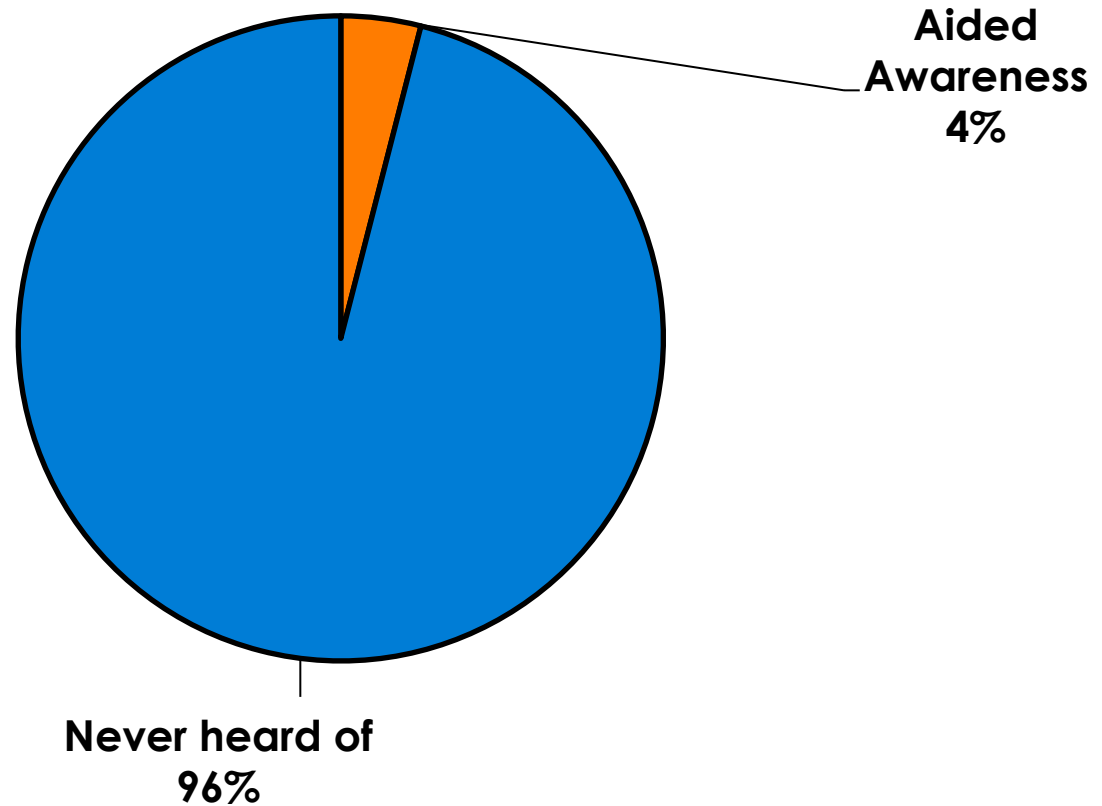
Airport Screening

7pt Rating Scale

7=Strongly Agree/ 1=Strongly Disagree



Shop Guam Festival



Shop Guam Festival - Impact

n=15

